December 2025

Travel in London 2025

Active travel trends

MAYOR OF LONDON

TRANSPORT FOR LONDON
EVERY JOURNEY MATTERS

Travel in London 2025

Active travel trends

2025 update

Table of contents

Summary of key findings

This report discusses the latest trends in active travel (cycling, walking and physical activity) until year 2025 or financial year 2024/25 (according to data availability) and introduces some new analysis of aspects of contemporary interest.

For more information about any of the items featured in this report please contact TiLEnquiries@tfl.gov.uk.

Cycling

- Cycling in London has grown strongly in recent years, particularly since the pandemic.
- In 2025 the estimated number of daily cycle journey stages in London (journey stages are parts of trips which may include other modes) reached 1.50 million, a 12.7 per cent increase from 1.33 million in 2024, bringing us closer to the Cycling action plan 2 target of 1.60 million daily cycle stages by 2030. This is more than three times the level of cycling in year 2000 (at an estimated 0.47 million).
- In terms of daily cycle trips (a cycle trip is an end-to-end one-way movement by cycle only), 2025 saw a 12.0 per cent increase, from 1.25 million in 2024 to 1.40 million in 2025.
- The trip-based mode share for cycling in London in 2024 was provisionally estimated at 4.7 per cent. This compares to 3.6 per cent in 2016.
- The number of hires of Santander Cycles increased by three per cent from 8.5 million in 2024 to 8.8 million in 2025. This reflected a five per cent increase in the number of member hires from 6.7 million in 2024 to 7.1 million in 2025 despite an eight per cent decline in casual hires from 1.8 million in 2024 to 1.7 million in 2025.
- In 2024/25, the proportion of London residents who cycled at least once in the previous year decreased slightly to 22 per cent, from 23 per cent the previous year. However, it remained higher than before the coronavirus pandemic in 2019/20, as did the absolute number of London residents that these proportions represent.
- Most sociodemographic groups saw net increases from before to after the pandemic in the proportion of people in those groups who cycled at least once in the previous year. But the cycling population still does not fully represent London's population.
- In terms of journey purpose, London residents' cycling trips before and after the pandemic saw a decrease for work purposes (affecting both commuting trips and other travel for work) and an increase for leisure and other purposes. The proportion of cycling trips made for shopping and personal business purposes also decreased, which is consistent with the long-term trend across all modes. This was all in the context of a net increase in the total number of trips over this period.
- Across London, 31 per cent of households had access to at least one cycle in their household, averaging to around 0.62 cycles per household or 0.83 cycles per London resident for the three-year average of years 2022/23 to 2024/25. Over this period there was a wide range of variability in cycle availability among boroughs, but in general inner London households were more likely to have access to a cycle than outer London households. Cycle availability was seen to increase with household income.
- By October 2025 the Strategic Cycle Network reached 431 kilometres, a seven per cent increase from the previous year, so that 29 per cent of Londoners lived within 400 metres of it, up from 27 per cent the previous year, thus bringing us closer to the Cycling action plan 2 target of 40 per cent by 2030.

- It is estimated that around a third of cycling in London takes places on TfL's Cycleways, despite this network only accounting for 2.5 per cent of all cyclable roads and paths in London, thus suggesting that cycle users prefer this kind of infrastructure.
- Based on results from our London Travel Demand Survey (LTDS) for the three-year average from 2022/23 to 2024/25, of the people who cycled at least once a month 43 per cent had used a Cycleway in the previous year. Of those who had used a Cycleway:
  - 76 per cent reported feeling safe all or most of the time on Cycleways, compared to only 40 per cent feeling safe all or most of the time on other roads or paths in London
  - 78 per cent stated that they were satisfied or very satisfied with Cycleways
  - 71 per cent agreed that the quality of their cycling journeys had improved
  - 70 per cent agreed that they felt safer cycling since the introduction of Cycleways
  - 59 per cent agreed that they would cycle further to use a Cycleway
  - 44 per cent agreed that they cycled for journeys they previously made by other means of transport
  - 42 per cent agreed that they cycled more in general since the introduction of Cycleways

Walking

- In 2024/25, London residents made 6.2 million walking (all the way) trips per day. This is 38 per cent of all trips made by London residents, making it the most common mode of transport.
- The trip rate (trips per person per day) of walking (all the way) trips made by London residents was 0.75 in 2024/25, up from 0.73 in 2023/24 and higher than any years before the pandemic except 2019/20 (0.76) but lower than the 2022/23 high point (0.81).
- Looking at trip rates by sociodemographic groups, there was little relative change between 2019/20 and 2024/25, with the exception of a decrease in the trip rate for London residents of working age (17 and over) who were not working, which is now at the same level as those in employment.
- Most walking (all the way) trips by London residents in 2024/25 were for leisure purposes (38 per cent) and shopping and personal business (24 per cent), with the least for commuting and other work-related purposes (six and one per cent, respectively). While the trend for most purposes remained constant over recent years, the proportion of shopping and personal business walking trips decreased steadily from 29 per cent in 2019/20 to 24 per cent in 2024/25, while the proportion of leisure trips increased from 34 per cent in 2019/20 to 38 per cent in 2024/25.
- The recovery of pedestrian activity (footfall) in central London following the pandemic continued in 2024 (with a three per cent increase from 2023) and into 2025 (with an average seven per cent increase in the first two quarters of 2025 compared to the same two quarters of 2024), although the level of activity remains lower than before the pandemic (by about ten per cent on average). The busiest areas of pedestrian activity in central London in spring 2025 were those typically associated with leisure and shopping destinations, which contrasts with the picture before the pandemic in 2019 when the highest pedestrian footfall was observed in areas typically associated with workplaces. While this perhaps suggests the continuation of changing

working patterns after the pandemic, in recent years there has been an increase in pedestrian activity in some typically working destinations like the City of London which has been increasing since 2022.
- Looking at London as a whole, it is estimated that in 2025 pedestrian flows saw minimal change from 2024 (0.8 per cent increase), with an observed decline in pedestrian flows in central London and small increases in inner and outer London.

Active travel

- In 2024/25, the proportion of London residents aged 20 and over who achieved 20 minutes of physical activity (walking or cycling) per day was 43.3 per cent, up from 39.6 per cent in 2023/24 and from 42.4 per cent in 2019/20 before the pandemic, making it the highest proportion recorded to date. The Mayor's Transport Strategy aim is for all London residents to achieve this level of physical activity by 2041, but the monitoring target for the metric above (as derived from the LTDS) is for 70.0 per cent achievement.
- The achievement of 20 minutes of physical activity among London residents aged 20 and over varied by sociodemographic group. In 2024/25, notable differences were observed by age (with younger people more likely to meet the target), ethnicity (with Black and Asian people less likely to meet the target) and disability status (with disabled people less likely to meet the target).
- Residents (aged 20 and over) of inner London boroughs were in general more likely to meet the target (51 per cent average over the three-year period between 2022/23 and 2024/25) than residents of outer London boroughs (35 per cent average over the three-year period between 2022/23 and 2024/25).

Cycling

Over the last couple of decades, cycling has become a well-established travel choice for many people in London. Although cycling still has a relatively small mode share in the overall London context (with a provisionally estimated trip-based mode share of 4.7 per cent in 2024), its growth trajectory over the longer term and more recently since the coronavirus pandemic is unlike that of any other mode.

Since the creation of TfL as London's transport authority 25 years ago, it is estimated that the number of daily journey stages made by cycle in London has more than tripled, with a 43 per cent increase between 2019 before the pandemic and 2025.

All of this means that cycling continues to make an essential and growing contribution to achieving several goals from the Mayor's Transport Strategy, notably the aim for 80 per cent of trips in London to be made by active, efficient and sustainable modes by 2041 and the aim for all Londoners to do at least 20 minutes of active travel per day by 2041.

This section explores the latest demand trends for cycling (including Santander Cycles and cross-river cycling following the opening of the Silvertown Tunnel), cycling behaviours by London residents (including some novel analysis on access to cycles in London households), the current extent of London's cycling network and some new insights about the relationship between cycle flows and cycling infrastructure as well as an overview of London residents' attitudes towards Cycleways.

Cycling demand

Consolidated estimates of cycle journey stages

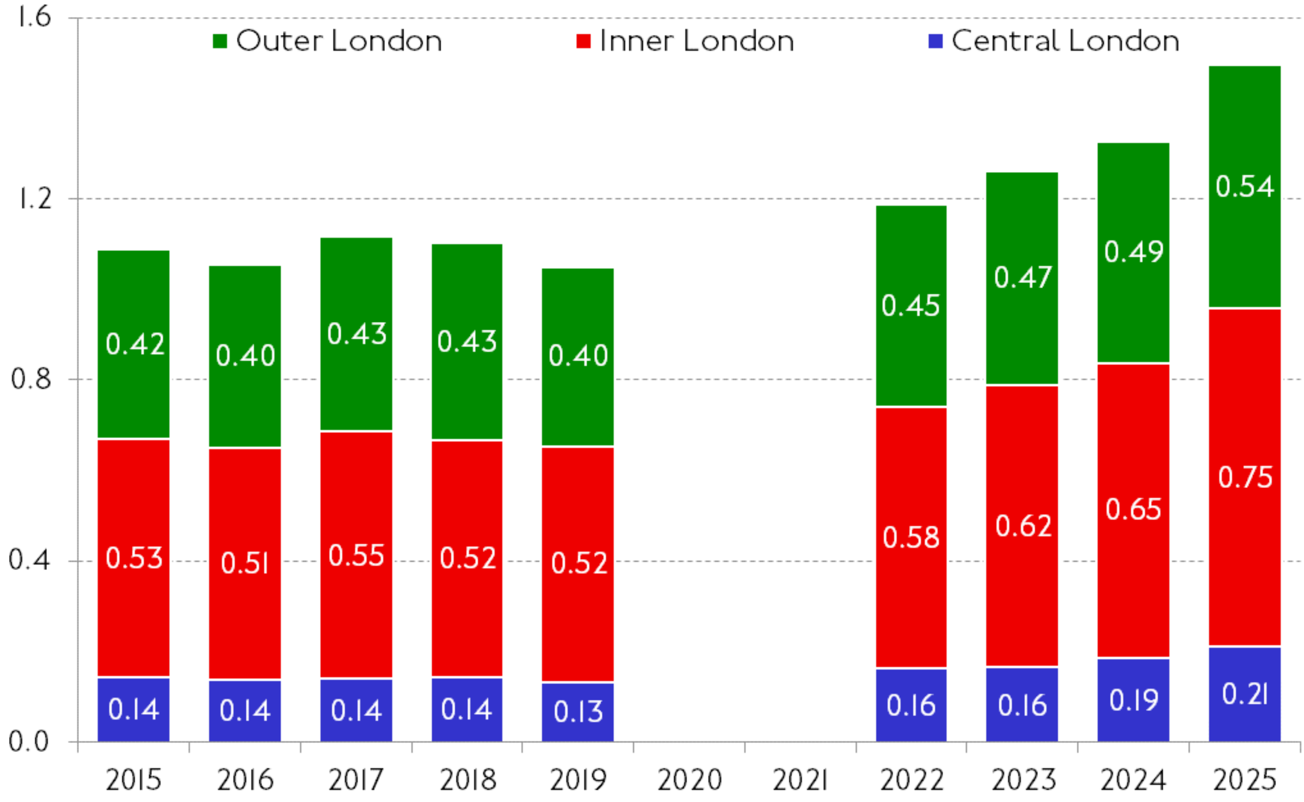
Our best estimates of daily cycling in London stem from weekday cycle counts conducted annually in spring at a representative panel of locations across London aggregated and expanded using additional data from our LTDS. A detailed methodology note of how these estimates are calculated is available.

The number of daily cycle journey stages in London (our headline metric) is aligned with the cycling target set out in the Cycling action plan 2, which aims for a 33 per cent increase in this metric to 1.6 million daily journey stages by 2030 from 1.2 million journey stages in 2022. Figure 1 shows the trend in this measure by London area over the last decade.

The coronavirus pandemic was a turning point for cycling that changed the pattern of little net change between 2015 and 2019 into a trajectory of substantial and sustained year-on-year growth from 2022 onwards.

In 2025 there were an estimated 1.50 million daily cycle journey stages across London, which is 12.7 per cent higher than the 1.33 million observed in 2024 and 43 per cent higher than the 1.05 million in 2019 before the pandemic. This demand in 2025 is similar to the number of daily boarders on the London Underground Northern and Piccadilly lines combined. Between 2024 and 2025 growth was strongest in inner London (14.8 per cent) followed by central London (12.8 per cent) and finally outer London (9.9 per cent).

Figure 1 Daily cycle journey stages (in millions) in London by area, seven day-week average, from 2015 to 2025.



Source: TfL Strategic Analysis, Customer & Strategy.
Note: Comparable data is missing for 2020 and 2021 due to the impacts of the coronavirus pandemic.

There are several reasons that explain this trend. On one hand, the 2025 estimate is the first that fully captures the impact of the pandemic on cycling, particularly in terms of weekend cycling and average journey length. This is because the calculations, in part, rely on three prior years of LTDS data. Furthermore, spring 2025 had particularly good weather and this likely favoured higher cycle flows for the counts that underpin the estimate.

On the other hand, the ongoing investment by TfL and London boroughs to expand the cycle network (in particular, Cycleways) and to address barriers to cycling also has an impact on the levels of cycling, as does the ongoing increase in dockless cycle hire journeys in London (see below for a discussion on our latest estimates of dockless cycle hire demand). Finally, it is also worth remembering that these estimates also capture cycling for non-personal travel (for example cycling done by delivery couriers).

Figure 2 looks at the trend in daily cycle journeys over a longer period, since year 2000. Note that the counts that underpin our current method to estimate cycle journey stages were only introduced in 2015, so results before then are back-estimated from relative change using our previous estimates and should therefore be considered as indicative.

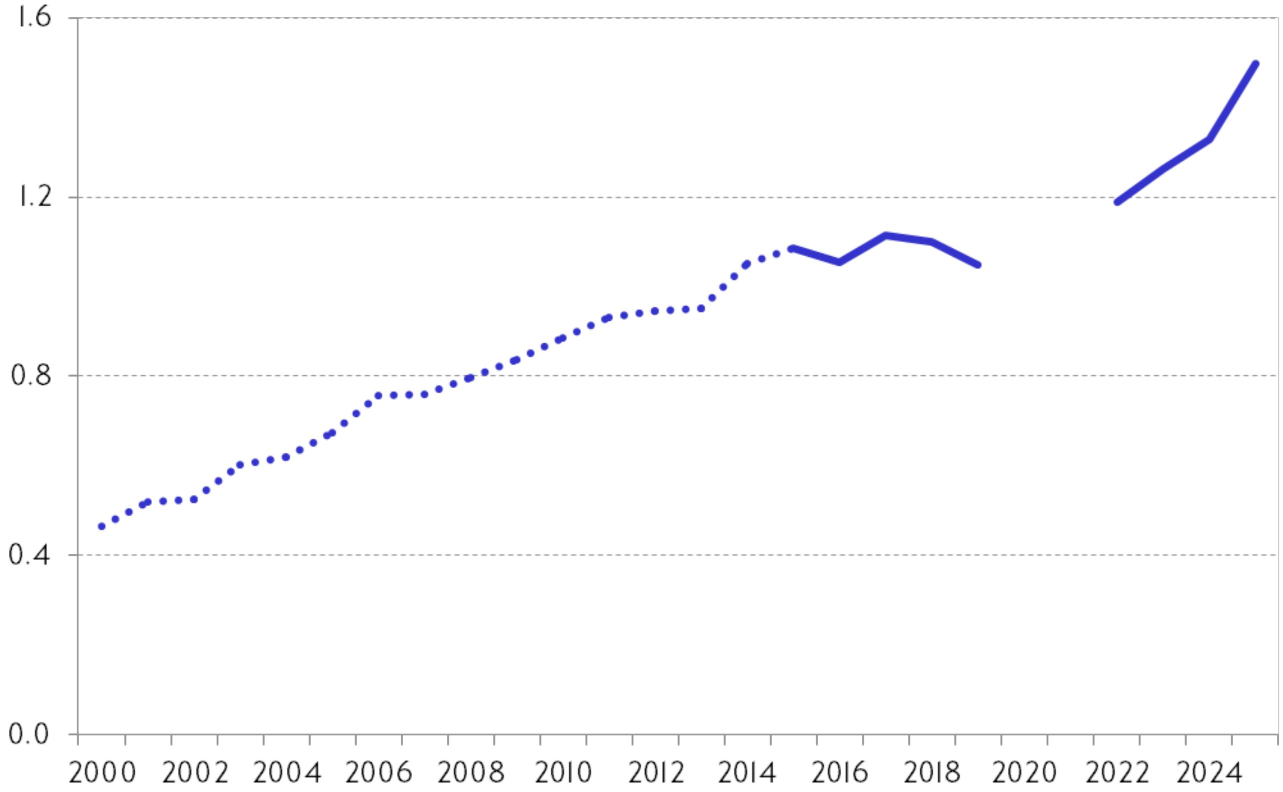
It is possible to identify three periods in the trend of cycle journey stages:

- A period of strong growth (average annual growth of six per cent) from 2000 to 2015
- A period of instability and stagnation between 2015 and 2019, with a small overall net decline of three per cent, albeit with local growth still observed in locations where investment in new cycle routes happened

- A period of renewed and stronger growth since 2022, with average annual growth of eight per cent

Over the whole period, the estimated number of daily cycle journey stages more than tripled from around 0.47 million in 2000 to around 1.50 million in 2025.

Figure 2 Daily cycle journey stages (in millions) in London by area, seven day-week average, from 2000 to 2025.



Source: TfL Strategic Analysis, Customer & Strategy.
Note: The method used to estimate cycle journey stages changed in 2015. | Comparable data is missing for 2020 and 2021 due to the impacts of the coronavirus pandemic.

Consolidated estimates of cycle trips

It is also possible to look at the cycling trends above in terms of trips instead of journey stages. A trip is a one-way movement for a single purpose that may be made up of multiple journey stages, each stage defined by a different mode. A trip is therefore assigned the mode of the longest stage. This means that the number of trips is always lower or equal than the number of journey stages, because there can be cycle stages as part of trips where the main mode (as defined by the longest distance) is different, for example a cycle stage to a train station followed by a train stage to the end destination.

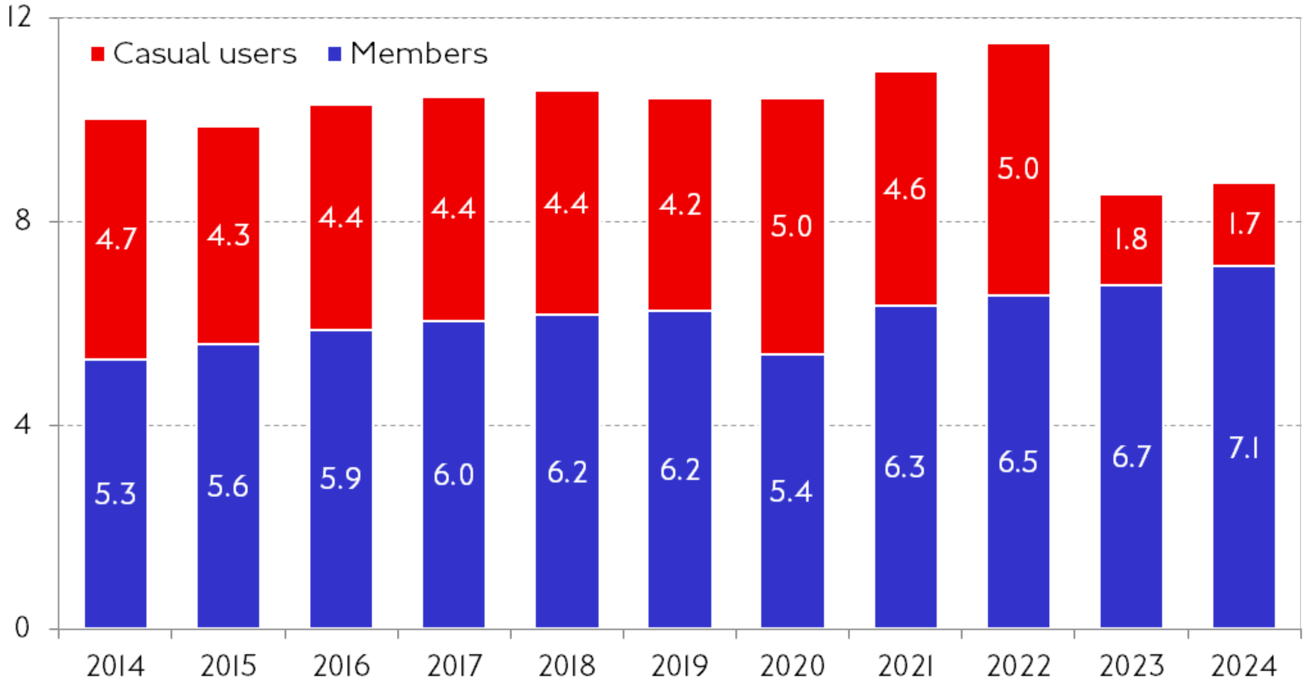
The key results in terms of cycling trips are that in 2025 cycle trips increased by 12.0 per cent from 1.25 million in 2024 to 1.40 million daily cycle trips across London, which also represents a 42 per cent increase from 0.98 million trips in 2019 before the pandemic. As with journey stages, the growth between 2024 and 2025 was highest in inner London (14.1 per cent), then central London (12.1 per cent) and finally outer London (9.2 per cent).

Demand on Santander Cycles

Summer 2025 marked the 15th anniversary of TfL's cycle hire scheme, which has been operating under the brand name Santander Cycles since 2015. At present, the scheme operates around 12,000 cycles (including 2,000 e-bikes) and more than 21,000 docking points across more than 800 docking stations in central and parts of inner London.

Figure 3 shows the annual number of hires by user type over the last ten years.

Figure 3 Annual hires (in millions) on Santander Cycles by user type, from 2014 to 2024.



Source: TfL Cycle Hire.

As discussed in the Travel in London 2024: Active travel trends report, the previous, almost steady growth in the number of hires was interrupted in 2023 by a drop in the number of casual hires, which was thought to mainly reflect a change in the fare structure introduced in late 2022. Since that initial change, there have been subsequent changes to Santander Cycles' fares, notably:

- The introduction of a Day Pass option in March 2024
- A further fare change with effect from April 2025 (hence with its impacts not visible on the graph above, which ends in 2024) consisting of:
  - The extension of the time available per ride for the Day Pass from 30 to 60 minutes with the price for this product increased from £3.00 to £3.50
  - The reduction of the single ride fare from £3.30 to £3.00

In 2024 the total number of hires increased again by three per cent from 8.5 million in 2023 to 8.8 million. This growth was driven by a five per cent increase in member hires from 6.7 to 7.1 million (the highest since the beginning of the scheme) and despite a further decline in casual hires from 1.8 to 1.7 million (eight per cent). Looking into more recent results, so far in 2025 (until September 2025, which was the latest data available at the time of writing) it seems that these trends are continuing, with a year-to-date four per cent net increase in hires driven by an eight per cent increase in member hires and a 12 per cent decrease in casual hires.

From these usage figures and the estimated number of cycle journey stages presented in the previous section it is possible to estimate the proportion of daily cycle journey stages in London that are made on Santander Cycles, using an annualisation factor. Our best estimate suggests that in 2024 approximately 1.8 per cent of the total daily cycle journey stages in London were made on Santander Cycles. While perhaps seeming low, it is important to remember that Santander Cycles only cover an area around central London but are largely unavailable in most parts of outer and inner London.

This proportion was similar in 2023 but slightly lower than that observed until 2022 (with the exception of the pandemic, where there is no reliable data for an estimate), which fluctuated around 2.7 to 2.9 per cent. The reason for this difference is to be found in the large drop in total hires observed in 2023 discussed above.

It is also important to consider other ways that the Santander Cycles market has changed recently. Since October 2022 e-bikes are available for hire as part of the scheme and the number of hires of these new cycles has been growing rapidly since their introduction both in absolute terms and as a proportion of total hires (see table 1).

Table 1 e-bike hires on Santander Cycles, from 2022 to 2025.

Year	e-bike hires	Total hires	Proportion of e-bike hires over total (percentage)
2022 (from October)	129,280	2,062,834	6
2023	618,679	8,537,426	7
2024	993,522	8,770,200	11
2025 (until September)	1,240,889	6,964,449	18

Source: TfL Cycle Hire.

Finally, another factor affecting these trends and the market for cycle hire schemes more generally is the continuous expansion of dockless cycle hire in London. A further discussion about the relative impact of dockless cycle hire schemes on the demand for cycling in London is the subject of the next section.

Estimate of relative cycling demand on dockless cycle hire schemes

Dockless cycle hire schemes are a service where users hire a cycle through a smartphone app without the need for physical docking infrastructure. Currently, the Mayor and TfL have no powers to manage these schemes, and so boroughs determine the approach to parking dockless cycles, which can be in mandatory marked bays, virtual bays, on-street cycle parking or free-floating.

At present, dockless cycle hire schemes in London are operated by a small number of private, for-profit companies and regulated through bilateral agreements between each operator and the local authority (borough) in which they operate.

In recent years, there has been an increased interest in understanding the impact of these schemes on cycling in London and on London as a city more generally, given that these schemes have grown significantly in terms of:

- number of operators
- fleet size (the number of cycles available for hire owned by each operator)
- number of boroughs with agreements for dockless cycle hire schemes

- amount of on-street parking allocated to dockless cycle hire schemes
- usage (the number of hires/journeys registered by each operator)

Unfortunately, however, the operating model of these schemes through private companies means that there is little or no data that is available publicly or to TfL on the number of journeys made on dockless cycles, since the operators consider this information commercially sensitive. Where data exists, it is often partial or patchy, inconsistent across the different operators and difficult to verify independently. Data that is available suggests an expansion of these schemes in recent years that is expected to continue in the future.

Furthermore, our strategic cycle counts cannot currently pick up whether a cycle is private, hired through Santander Cycles or hired through one of the dockless hire operators, therefore making the monitoring of this demand quite challenging.

Using the little hard evidence available and several assumptions, we have estimated a rough approximation of the proportion of daily cycle journey stages that may be made on dockless cycles. We believe this to have been **around 10 per cent** of the daily cycle journey stages during peak hours (07:00 to 10:00 and 16:00 to 19:00) in 2024. Given the very limited information on which this figure is based, it should be treated with caution and only as an indication of the order of magnitude.

Assuming that this estimate from peak hours could be extrapolated to the whole day and considering the estimate of 1.9 per cent of daily cycle journey stages made by Santander Cycles discussed in the previous section, this would amount to **approximately 12 per cent of cycle journey stages made by hired cycles on an average day in London in 2024**, leaving an estimated 88 per cent made by private cycles.

While tentative, these figures seem to align to an alternative estimate from the LTDS suggesting that 11 per cent of cycling trips (note that trips are different from journey stages, although usually very aligned for cycling) made by London residents aged five and over between 2022/23 and 2024/25 were made by hired cycles, compared to 89 per cent by private cycles.

It is clear, therefore, that cycle hire (and in particular dockless cycle hire) has an important presence in London with over one in 10 cycle journey stages being made on a hired cycle.

While at face value these results suggest that the relative share of dockless cycle hire is five times that of Santander Cycles, the two services are very different and direct comparisons must be contextualised and caveated:

- To start with, dockless cycle hire is available across a substantially larger area than Santander Cycles and the number of dockless cycles available for hire in London is thought to be much higher than the Santander Cycles fleet.
- The type of cycle also differs, with most if not all dockless hire cycles in London being e-bikes compared to a small (but increasing) proportion of Santander Cycles that are e-bikes.
- The operating models are also evidently quite different and each offers opportunities and challenges to users.
- Finally, the combination of all of the above could affect characteristics such as the average journey length on each service, which impacts the journey stages estimates.

Demand across the Thames around the Silvertown Tunnel

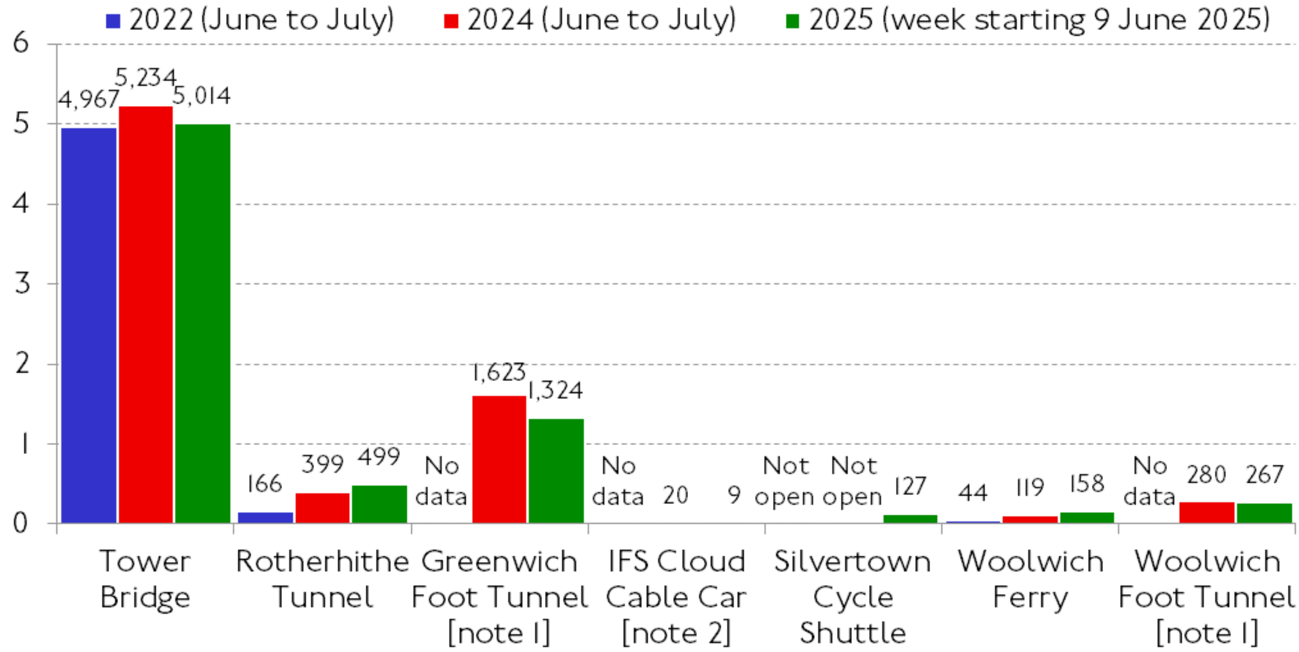
The Silvertown Tunnel, which opened in early April 2025, is a new road crossing of the River Thames in east London that connects Silvertown and the Royal Docks with the Greenwich Peninsula. While use of the tunnel is exclusively for motorised road traffic, TfL is committed to providing a high-frequency cycle shuttle service for at least three years after the tunnel's opening (that is, until April 2028).

The Silvertown Cycle Shuttle is operated using an adapted bus that can carry a range of different cycle types, including non-standard cycles such as cargo bikes. The service is currently free and will remain so until at least April 2026. The service is available every day (except Christmas Day) from 06:30 until 21:30, with a frequency of five services per hour. Each service has a capacity of up to eight conventional cycles and up to seven folding cycles.

To support the ongoing monitoring programme (which was described at length in a previous [Travel in London 2025 – Focus report: The Silvertown Tunnel – baseline monitoring] and in the [Silvertown and Blackwall Tunnels three-month monitoring report]) TfL commissioned annual counts of cycles on all river crossings within a reasonable catchment of the Silvertown Tunnel (all crossings between Tower Bridge and the Woolwich Foot Tunnel). This builds on the existing biennial Thames screenline counts programme on all river crossings in London and focuses specifically on the area around the Silvertown Tunnel to help understand if there are any changes in cycle demand following the launch of the Silvertown Cycle Shuttle.

The results from the first wave of these counts (in June 2025) are shown in figure 4 alongside the baseline from around the same time in 2024 before the tunnel opened and alongside equivalent data from the 2022 Thames screenline counts.

Figure 4 Number of cycles crossing the Thames per day during the Silvertown Cycle Shuttle operating hours (06:30 to 21:30) on selected river crossings and years, by crossing and year, 2022, 2024 and 2025.



Source: TfL Strategic Analysis, Customer & Strategy.
[Note 1] At the time of the 2025 counts, the north lift on each tunnel was out of service.
[Note 2] This data is for 24 hours, not only the Silvertown Cycle Shuttle operating hours.

These results show that the number of cycle crossings east of Tower Bridge is fairly low (about a third of the flow across Tower Bridge), with the Greenwich Foot Tunnel showing five to 10 times more crossings than any of the other crossings east of Tower Bridge. It is worth noting, however, that access to both the Greenwich and Woolwich Foot Tunnels is aided by lifts that in recent years have had important reliability issues and extended periods of down time, which would have affected the number of cycle users (given the potential need to carry the bike up and down stairs at either or both ends).

As of June 2025, a couple of months after the launch of the service, the Silvertown Cycle Shuttle carried an average of 127 cycles per day. This means that demand for the Silvertown Cycle Shuttle is similar to the Woolwich Ferry but is the lowest of all east London cycle crossings except for the IFS Cloud Cable Car.

It is likely that the reasons for this are a complex combination of several factors such as:

- The location of trip attractors (origins and destinations of the trips) in this part of London, which would be a key factor in what is the most convenient crossing for the most direct route.
- The number of people who cycle in this part of London, the number and type of trips made by those people and the propensity for others to take up cycling.
- The relative attractiveness of each crossing for people who cycle, determined by: the presence of cycling infrastructure, the need to dismount and board another vehicle (for example the shuttle bus, the ferry or even the lifts at the foot tunnels), the need to add wait time (relevant for the shuttle bus and the ferry in particular), the cost (relevant to the IFS Cloud Cable Car only), etc.
- Potential users' awareness of the different alternatives, in particular of the relatively new Silvertown Cycle Shuttle.

Before the Silvertown Tunnel opened, the Silvertown Cycle Shuttle was promoted in leaflets distributed across 13 boroughs in east London, in customer emails to target audiences and in a video that was shared on social media. To encourage more Londoners to try the service, in the summer of 2025 we increased advertising to further build awareness of this new cross-river cycle option. This included promoting the online video, collaborations on social media to showcase the use of the cycle shuttle service, roadside posters in areas close to the two shuttle stops, press advertisements in local publications and further emails to TfL customers with an interest in cycling. Feedback from stakeholders and users has been reviewed and we continue to look at ways to grow usage of the service and support cyclists to adapt their routes to benefit from this innovative new crossing option.

Cycling by London residents

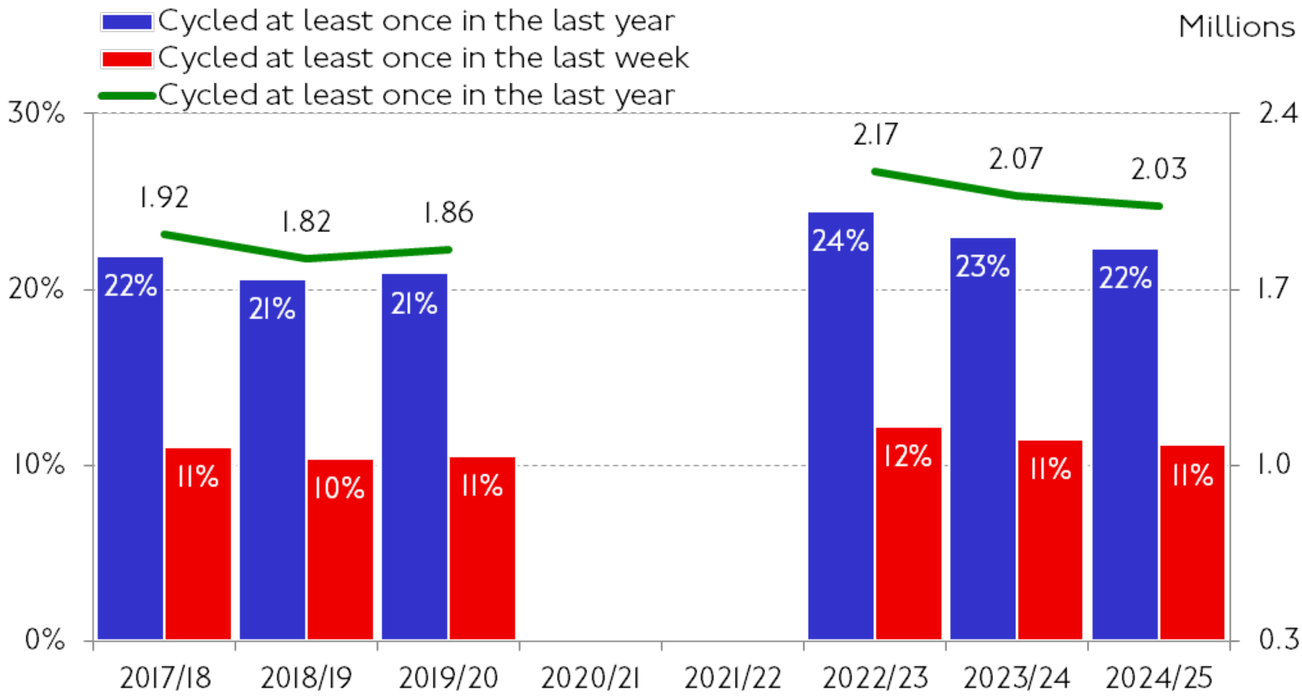
The LTDS captures the cycling behaviour of London residents aged five and over and therefore provides a means to estimate various trends of interest.

Overall proportion of London residents who cycle

It is important to understand the cycling population and how it changes over time.

Figure 5 shows the proportion of London residents who cycled at least once in the last year and at least once in the last week over recent years. For context, it also provides an estimate of the absolute number of London residents who cycled at least once in the last year using the latest population estimates.

Figure 5 Proportion and estimated number of London residents who cycled at least once in the last year or in the last week, LTDS, from 2017/18 to 2024/25.



Source: TfL Strategic Analysis, Customer & Strategy.
Note: Comparable data is missing for 2020/21 and 2021/22 due to the impacts of the coronavirus pandemic.

Despite fluctuations, the proportion of London residents who cycled has remained stable in recent years, between 21 and 24 per cent for those who cycled at least once in the last year and 10 to 12 per cent for those who cycled at least once in the last week.

In 2024/25 these proportions decreased slightly. However, they remained higher than the pre-pandemic position in 2019/20, as did the estimated absolute number of London residents who cycled at least once in the last year (2.03 million in 2024/25 compared to 1.86 million in 2019/20). It is also interesting to note that there is noticeable variability within these categories. For example, in 2024/25, among all London residents who cycled at least once in the last year, almost half did so at least once a week, thus suggesting that many London residents who cycle at all do so quite frequently.

These results need to be interpreted in the context of increasing numbers of cycle journey stages year-on-year as discussed above. While seemingly showing diverging trends (strong growth of cycle stages and slight decrease in the cycling population), there are several factors that could explain this discrepancy:

- Firstly, the fact that these are different methods with very different aims is perhaps in itself the main reason why the results do not necessarily match.
- It is also important to note the timescales of each source. The strategic cycle counts that underpin the cycle stages estimates are collected in spring of each (calendar) year, while the LTDS runs continuously and is reported by full financial year, so that the latest results from LTDS are until 2024/25, which ended in March 2025, while the latest counts are from spring 2025 (April to July).
- Furthermore, the LTDS is restricted to travel by London residents and for personal travel. However, the counts capture all cycle flows in London, including people who

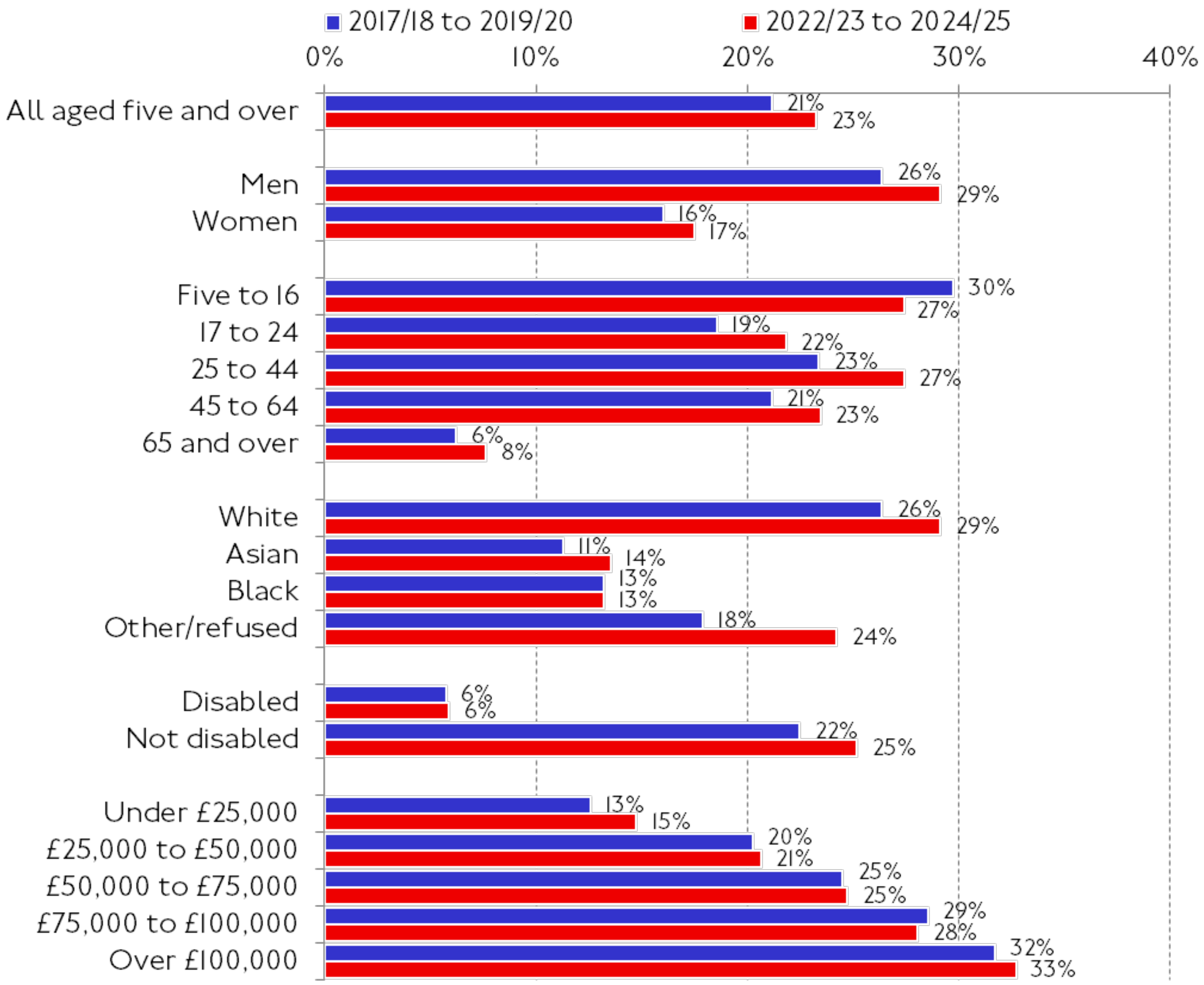
cycle as a part of their job (for example, delivery couriers) and people who do not live in London (either day commuters or other kinds of visitors or tourists). It is unfortunately impossible to separate out those cycle flows from the total using our existing methods.

Proportion of London residents who cycled at least once in the last year

This section explores the proportion of London residents who cycled at least once in the last year by looking at differences by sociodemographic group. Since some groups have small sample sizes, the results are aggregated across the three most recent survey years.

Figure 6 shows the proportion of London residents who cycled at least once in the last year by sociodemographic characteristics for all individuals aged five and over, looking at the most recent three years and comparing that to the pre-pandemic baseline.

Figure 6 Proportion of London residents who cycled at least once in the last year, by selected sociodemographic groups, LTDS, three-year averages between 2017/18 and 2019/20 and between 2022/23 and 2024/25.

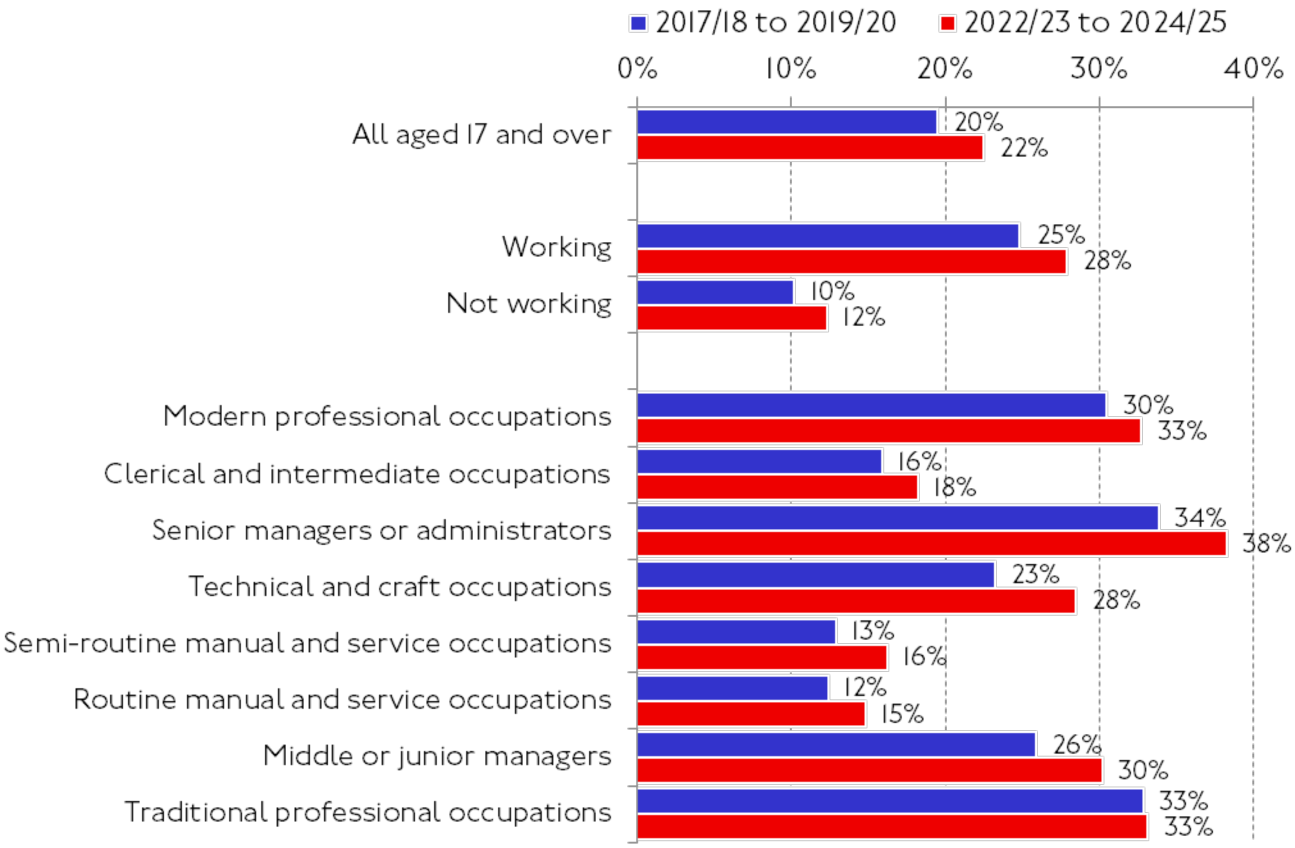


Source: TfL Strategic Analysis, Customer & Strategy.
Note: Due to various issues with the ethnicity data, it is not possible to separately report each component of the 'other/refused' category. These issues also affected the number of people who 'refused' to respond to this question. Although not ideal, presenting these categories combined provides the best like-for-like comparison between the two assessed time periods.

In general, across almost all sociodemographic groups there was a small increase in the proportion of London residents who cycled at least once a year on average in 2022/23 to 2024/25 compared to before the pandemic. Only those aged five to 16 and those living in households with an income of between £75,000 and £100,000 saw a small decrease.

Figure 7 focuses on characteristics related to employment for London residents of working age (17 and over). Of particular interest is how working status and the type of work has a strong influence on whether a London resident has cycled in the past year, with those not working and those working in routine and semi-routine manual and service occupations noticeably less likely to do so than people working in modern or traditional professional, administrative or managerial roles.

Figure 7 Proportion of London residents of working age (17 and over) who cycled at least once in the last year, by selected sociodemographic groups, LTDS, three-year averages between 2017/18 and 2019/20 and between 2022/23 and 2024/25.



Source: TfL Strategic Analysis, Customer & Strategy.

In addition, table 2 looks at how representative the cycling population was for each of those groups in the most recent three-year period compared to the whole population from the LTDS (as a proxy for the general population).

The main conclusion from the table is that, despite the advances in recent years shown in the previous graphs, imbalances remained for several sociodemographic groups. For example, despite men and women making up equal proportions of the London resident population (50 per cent each), women were under-represented among people who cycled at least once in the last year, accounting for only 38 per cent of that group, while 62 per cent were men.

Table 2 Sociodemographic profile of London residents who cycled at least once in the last year compared to the LTDS full sample, LTDS, three-year average between 2022/23 and 2024/25.

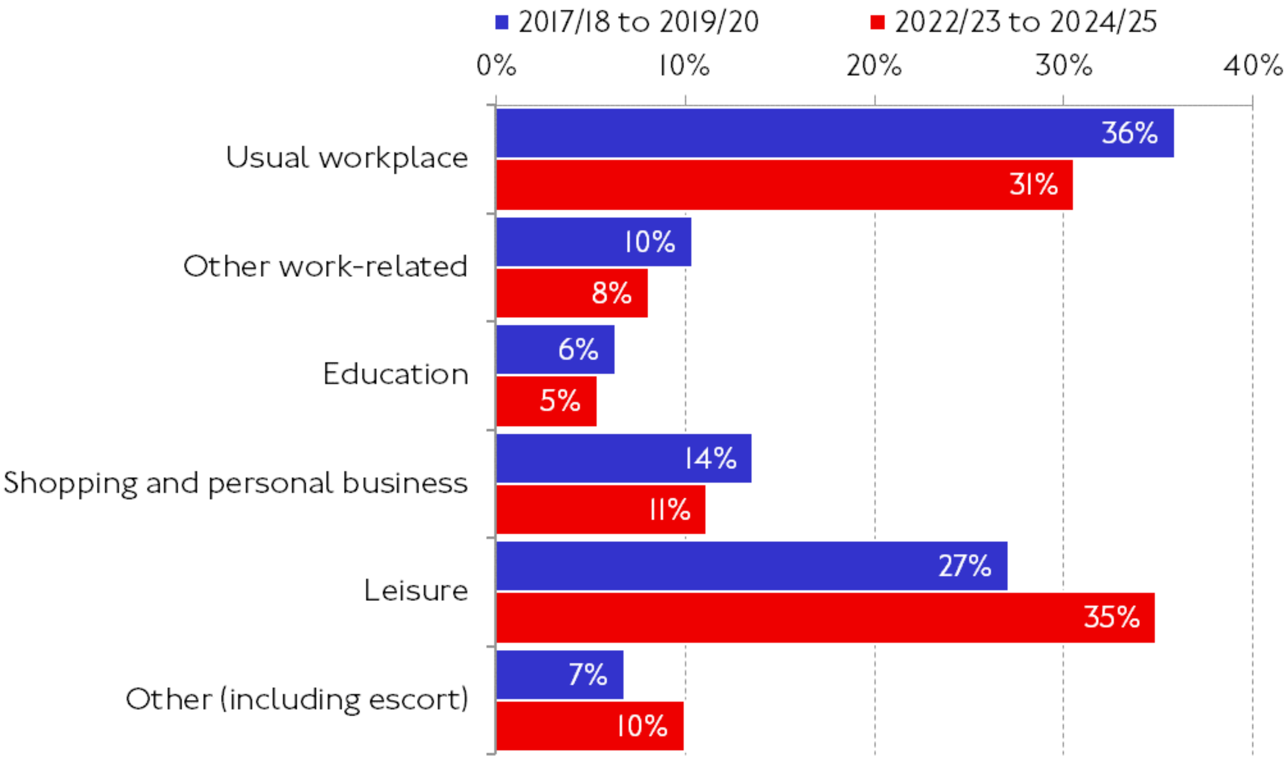
Group	Cycled at least once in the last year (percentage)	LTDS full sample (percentage)
Men	62	50
Women	38	50
Five to 16	19	16
17 to 24	10	11
25 to 44	42	36
45 to 64	25	25
65 and over	4	13
White	68	54
Asian	12	21
Black	7	12
Other/refused	13	13
Disabled	2	8
Not disabled	98	92
Under £25,000	15	24
£25,000 to £50,000	24	28
£50,000 to £75,000	17	16
£75,000 to £100,000	13	11
Over £100,000	30	21
Working	81	65
Not working	19	35
Modern professional occupations	37	32
Clerical and intermediate occupations	6	9
Senior managers or administrators	16	11
Technical and craft occupations	10	10
Semi-routine manual and service occupations	4	8
Routine manual and service occupations	7	14
Middle or junior managers	6	6
Traditional professional occupations	14	11

Source: TfL Strategic Analysis, Customer & Strategy.

Characteristics of cycling trips by London residents

Figure 8 shows London residents' cycling trips by journey purpose (as a proportion) and how this changed before and after the pandemic.

Figure 8 Proportion of London residents' cycling trips by journey purpose, LTDS, three-year averages between 2017/18 and 2019/20 and between 2022/23 and 2024/25.



Source: TfL Strategic Analysis, Customer & Strategy.

Noteworthy trends include:

- A decrease in the proportion of cycling trips for work purposes (affecting both commuting trips to a usual workplace and other travel for work) and for education. While three-year averages are shown in the graph for simplicity, the trajectory in the more recent, post-pandemic data suggests that the proportion of cycling for usual workplace and education may be increasing.
- The proportion of cycling trips made for shopping and personal business purposes also decreased from 14 per cent to 11 per cent (consistent with the long-term trend across all modes).
- There was a large relative increase in the share of cycling trips for leisure and other purposes.

The above trends need to be seen in the context of a net increase in the number of cycling trips after the pandemic, driven by increases in the number of leisure and other (including escort) trips and decreases in other purposes.

All these trends likely reflect the resurgence of cycling during and after the pandemic as well as a relative reduction in the number of work-related trips observed on all modes over this period.

Another aspect of interest is the extent to which London residents' cycling trips are made as part of a group. On average across the period from 2022/23 to 2024/25, 81 per cent of cycling trips by London residents were unaccompanied, 14 per cent were made accompanied by other people aged five and over, one per cent with children aged under five and the remaining three per cent by a combination of people over and under five years of age.

Access to cycles in the household by London residents

A key driver of cycling behaviour is access to a roadworthy cycle. In most cases, particularly in areas of London not covered by cycle hire schemes, this involves access to a cycle in the household. However, gaps remain in terms of access to cycles for many London residents, with differences by various sociodemographic characteristics. Unless otherwise specified, this section explores some of these trends for the average of years 2022/23 to 2024/25 from our LTDS, therefore providing a robust post-pandemic baseline.

Across London, 69 per cent of households did not have a cycle available to them, with 15 per cent of households having access to one cycle and the rest to more than one. This averages to around 0.62 cycles per household. Looking at it in terms of residents, 62 per cent of London residents did not have access to a cycle, 15 per cent had access to one and the rest to more than one, which yields an average of 0.83 cycles per London resident. Most cycles available to London households were conventional cycles, particularly in households with only one cycle available, with electric and folding cycles typically featuring mostly in households that had access to at least two cycles.

These high-level figures conceal some variability across other dimensions. For example, there were differences between households in inner and outer London. In inner London, 67 per cent of households (61 per cent of residents) did not have access to a cycle in the household, compared to 70 per cent of households (67 per cent of residents) in outer London. This is likely due to various factors affecting travel behaviour in inner versus outer London, the predominant type of dwellings found in each area and, crucially, the availability of space to store cycles in the household. In fact, results from the LTDS suggest that 96 per cent of households in inner London with access to at least one cycle store their cycles securely (defined as either off-street inside their property or in a communal area or on-street in a locked facility), compared to nearly 100 per cent of households in outer London. The remaining cycles were stored less securely at public on-street parking such as bike stands, railway stations or other locations.

The ability to securely park or store cycles is known to be critical to enable access to cycles in the household. In 2024/25, 74 per cent of London residents (71 per cent of households) had the ability to securely store cycles in their household, while 26 per cent of London residents (29 per cent of households) did not have this option. This had a direct impact on the proportion of people who actually have (access to) a cycle in their household. In fact, among London residents living in households with access to secure cycle parking, the average number of cycles reached 1.04 cycles per resident (1.17 in inner London and 0.97 in outer London) in 2024/25, which is equivalent to 0.81 cycles per household (0.93 in inner London and 0.75 in outer London). Note that these results are from 2024/25 only and not a three-year average. This is because the survey question that enables this comparison was only introduced in 2024/25.

Table 3 shows that around 48 per cent of London residents living in households with access to secure cycle parking had access to at least one cycle in their household, compared to around two per cent of residents living in households without access to secure cycle parking facilities (either on- or off-street). It is therefore important that cycle parking is considered for both existing and new housing and that appropriate provision is made. However, there needs to be a balance between the level of provision in new developments, current demand, catering for future growth (particularly given the policy aims to increase cycling and the longevity of housing) and the space and viability pressures facing developments (particularly dense development on constrained sites).

Table 3 Proportion of London residents with access to a cycle in their household, by number of cycles available and ability to securely park or store cycles, LTDS, 2024/25.

Number of cycles in the household	Households with access to secure cycle parking (percentage)	Households without access to secure cycle parking (percentage)
None	52	98
One	20	1
Two	13	less than 1
Three or more	15	less than 1

Source: TfL Strategic Analysis, Customer & Strategy.
Note: In this context, access to secure cycle parking is defined as ability to store at least one cycle either inside the property, in a communal area within the building/premises or in a secure (locked) parking facility outside the home. Note however that this definition does not consider the convenience or quality of this space. For example, 'inside the property' could mean on a balcony or under stairs.

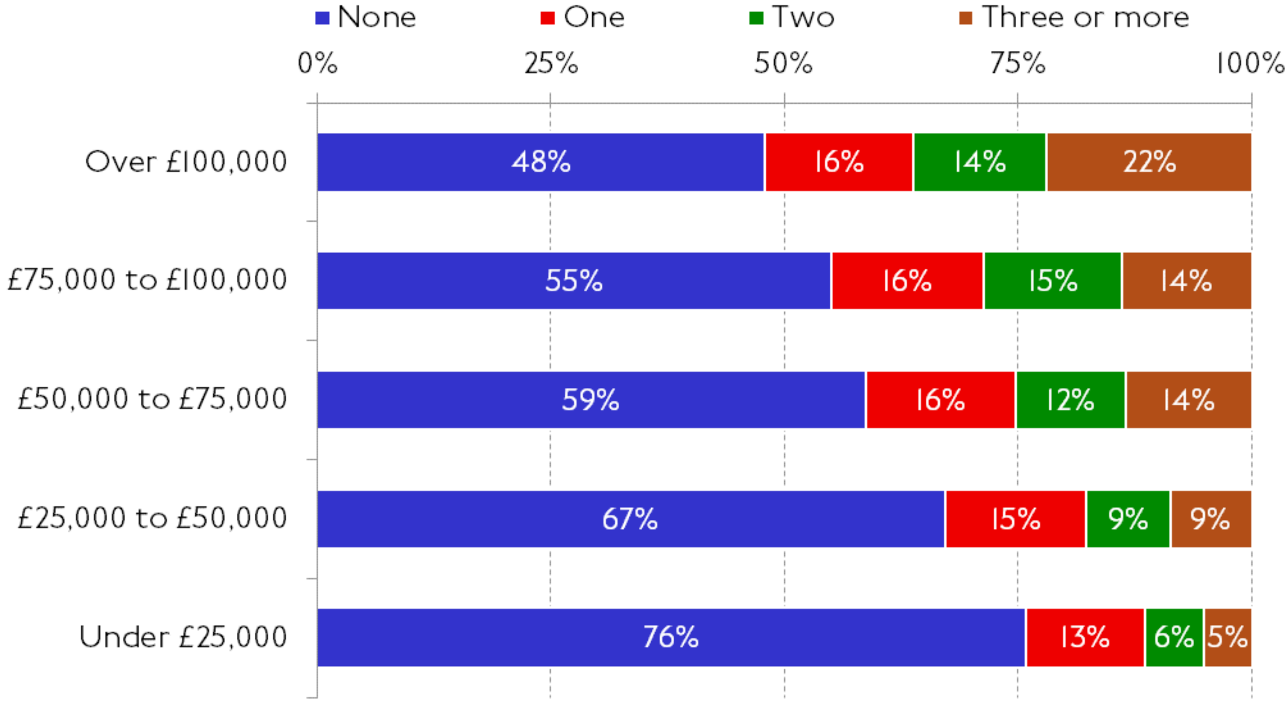
Besides access to secure cycle parking, the proportion of London residents who have access to a cycle in their household also differs by sociodemographic characteristics such as borough of residence, household income, ethnicity or type of occupation for residents in employment. These are explored in the remainder of this section. Note however that the results shown do not consider whether the households where these residents live have access to secure cycle parking. As shown above this is a very important factor but it is not available for the three-year averages presented below. Nonetheless, the results provided still offer useful insights into characteristics that have an impact on access to cycles in the household regardless of the ability to securely park or store the cycle in the household. Note also that these characteristics may be correlated to the type and location of dwellings where these groups live.

Figure 9 shows cycle availability in the household for London residents based on the combined household income. The correlation between number of cycles available and household income is evident.

Figure 10 shows cycle availability for London residents based on ethnicity. There are clear imbalances in access to cycles for different ethnic groups, with up to 75 per cent of Black London residents without access to a cycle in their household compared to only 57 per cent of White residents.

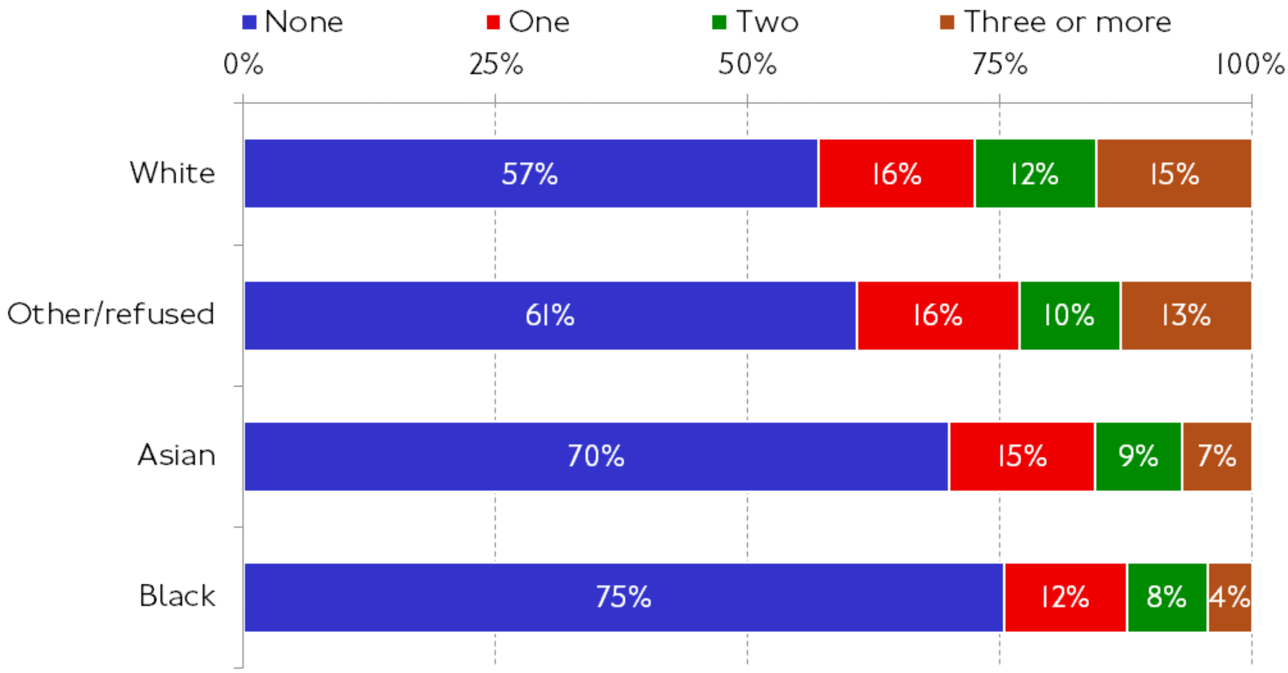
Finally, employment type also seems to show differences in access to cycles (figure 11), with workers in jobs traditionally more associated with office work, a single workplace, fixed hours and more responsibility more likely to have access to a cycle in their household than those in manual and service occupations or at lower seniority levels.

Figure 9 Proportion of London residents with access to a cycle in their household, by number of cycles available and household income, LTDS, three-year average between 2022/23 and 2024/25.



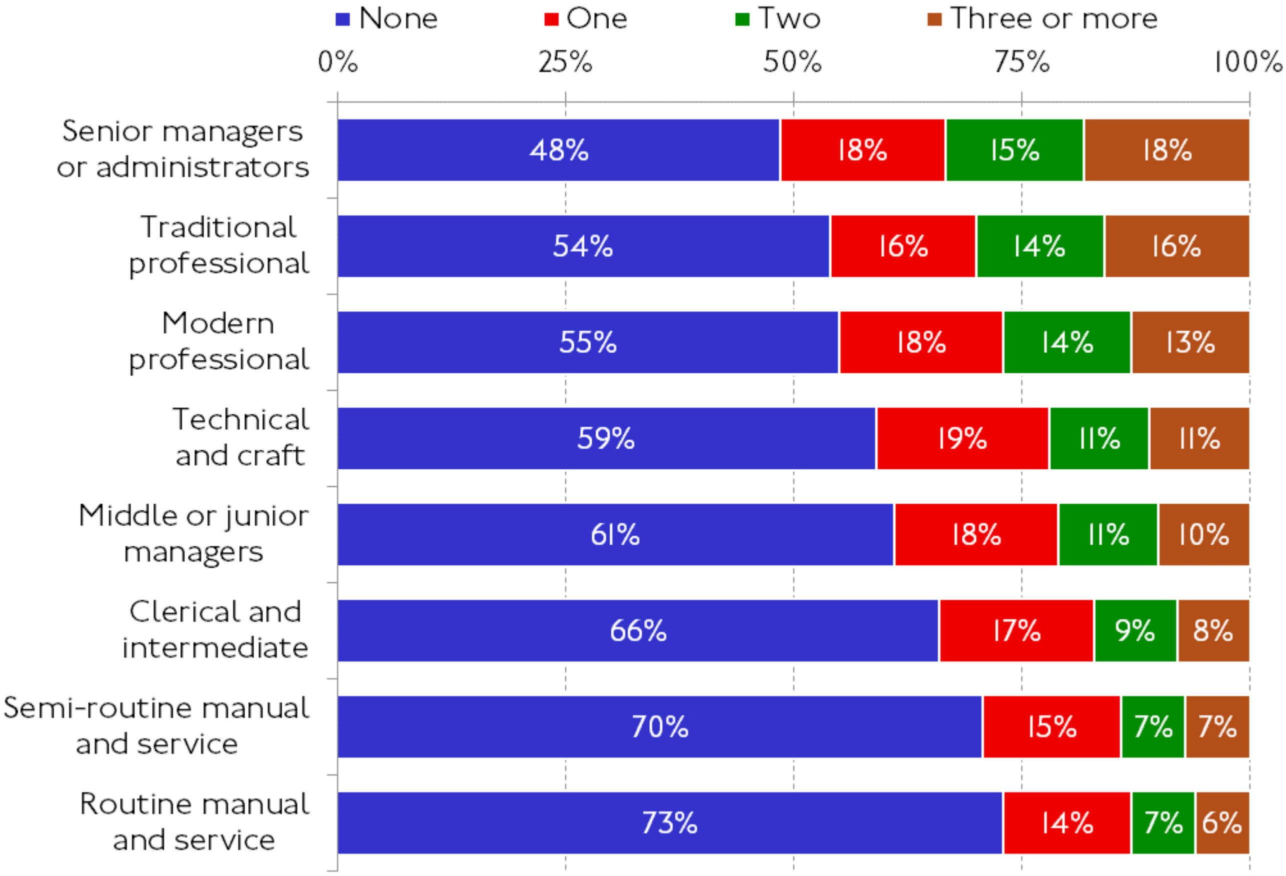
Source: TfL Strategic Analysis, Customer & Strategy.

Figure 10 Proportion of London residents with access to a cycle in their household, by number of cycles available and ethnicity, LTDS, three-year average between 2022/23 and 2024/25.



Source: TfL Strategic Analysis, Customer & Strategy.
Note: Due to various issues with the ethnicity data, it is not possible to separately report each component of the 'other/refused' category. These issues also affected the number of people who 'refused' to respond to this question. Although not ideal, presenting these categories combined provides the best like-for-like comparison between the two assessed time periods.

Figure 11 Proportion of London residents of working age (17 and over) with access to a cycle in their household, by number of cycles available and employment type, LTDS, three-year average between 2022/23 and 2024/25.



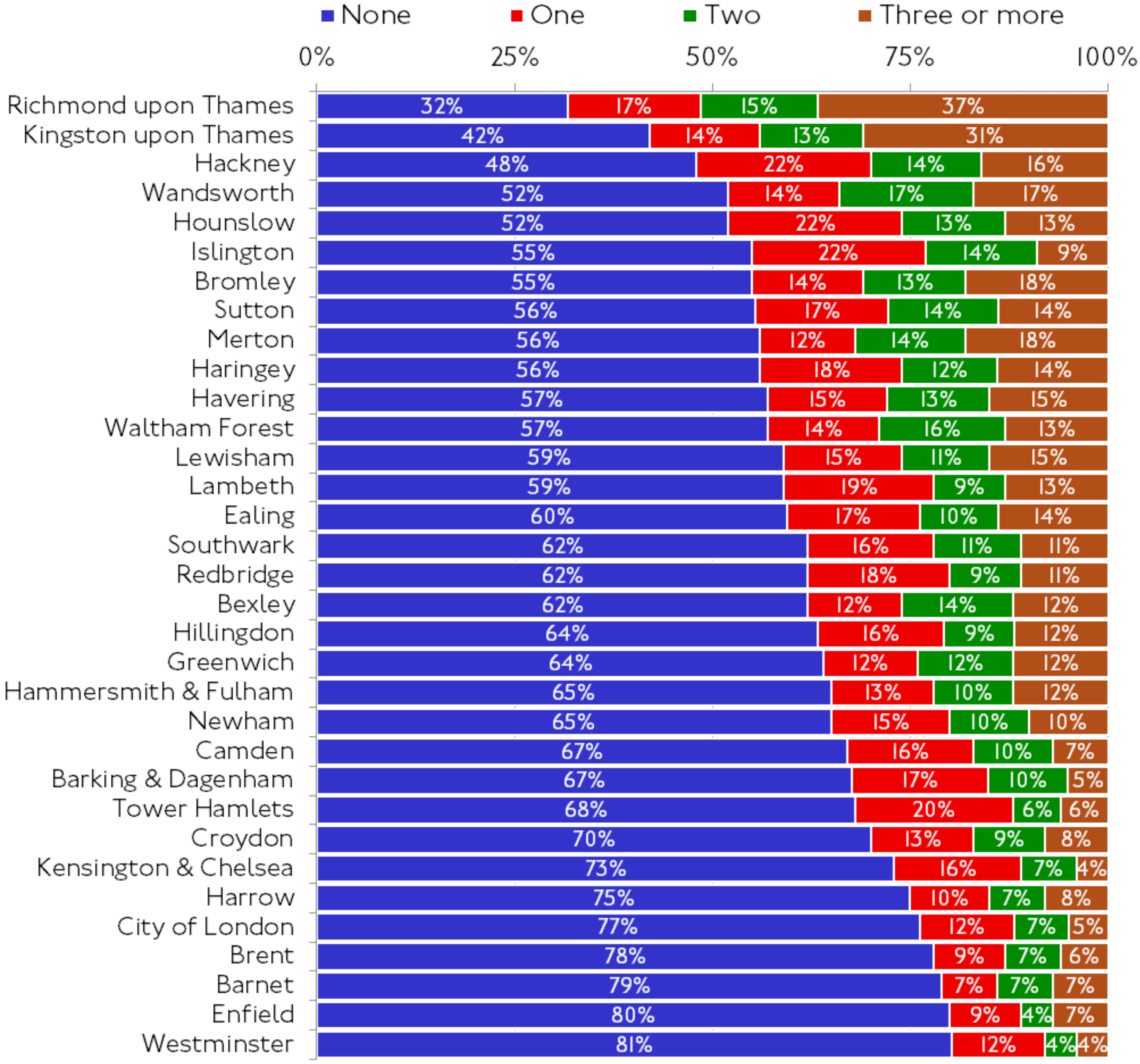
Source: TfL Strategic Analysis, Customer & Strategy.

It is also possible to look at cycle availability trends by borough of residence. Figure 12 shows the proportion of residents in each borough by availability of cycles in their household, sorted in decreasing order of access to cycles in the household.

There was a wide range of variability among boroughs. While only around a fifth of residents in boroughs like Westminster, Enfield and Barnet had access to at least one cycle in their household, more than half and up to over two thirds of residents in boroughs such as Hackney, Kingston upon Thames and Richmond upon Thames had access to at least one cycle in their household, and in the case of the latter 37 per cent of residents had access to three or more cycles.

This variation does not present a simple inner/outer pattern due to several other factors at play. On one hand, aspects such as the attractiveness of the cycling environment and the proximity to desired destinations may drive higher access to cycles in the household typically (but not exclusively) in inner London. On the other hand, a lack of access to secure cycle parking at home could drive lower access to cycles in inner London households. As discussed above, in 2024/25 on average 26 per cent of London residents lacked the ability to securely park or store their bikes at home. However, this figure could be noticeably higher in some boroughs (particularly some inner London boroughs where more residents live in flats or less spacious housing without any on- or off-street secure cycle parking provision) so that the interaction between these two and other factors like personal attitudes to cycling and the sociodemographic composition of each borough create a particularly complex picture.

Figure 12 Proportion of London residents with access to a cycle in their household, by number of cycles available and borough of residence, LTDS, three-year average between 2022/23 and 2024/25.



Source: TfL Strategic Analysis, Customer & Strategy.

Cycling on London's cycle network

This section discusses various aspects of interest in relation to dedicated cycle infrastructure for movement (such as cycle lanes and traffic-calmed or low-traffic routes). For the purposes of this section, it is important to understand the differences between a few different terms:

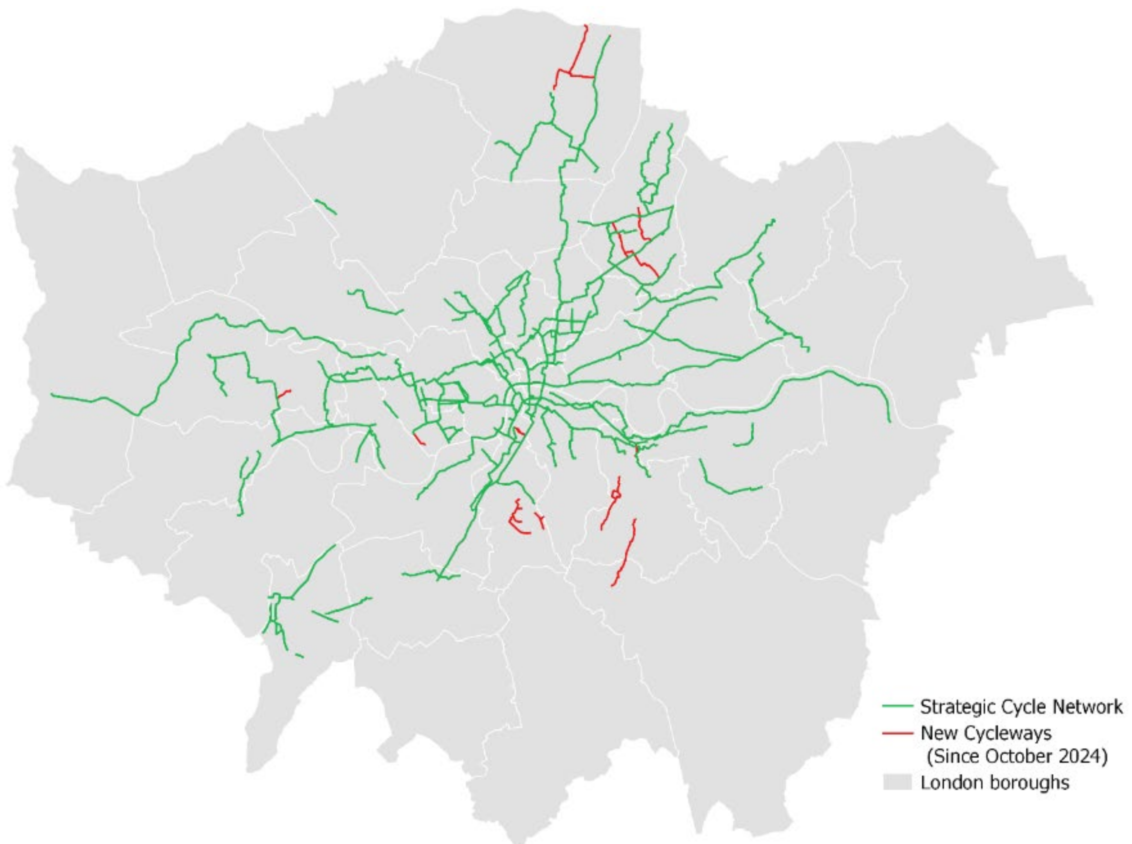
- The **cyclable network** comprises all the roads and paths in London where cycling is legal. It therefore includes paths through parks, towpaths and shared pedestrian spaces where cycling is allowed. This is not a strictly defined term but one that tries to encompass all the places in London's urban realm where one could in theory cycle.

- The **Strategic Cycle Network** includes all existing TfL cycle routes such as Cycleways or remaining Cycle Superhighways and Quietways. The Mayor's Transport Strategy aims for 70 per cent of Londoners to live within 400 metres of the Strategic Cycle Network by 2041, with an interim target of 40 per cent by 2030.
- The **Cycleway network** (or simply Cycleways) comprises all cycle routes in London that meet TfL's New cycle route quality criteria, which were introduced in 2019 (and retrospectively applied to existing routes where applicable) to determine whether a cycle route meets certain quality standards.
- Finally, towards the end of this section there is novel analysis that looks at the relationship between cycle flows and the presence of local infrastructure elements that can support cycling, such as cycle lanes (regardless of whether they are part of the Cycleway network and/or Strategic Cycle Networks defined above) but also bus lanes or (cyclable) motor vehicle-free paths of any kind. The term **cycling infrastructure** is used to describe these elements loosely and collectively.

Expansion of London's Strategic Cycle Network

One of the ambitious aims in the Cycling action plan 2 is the continuous expansion of London residents' access to the Strategic Cycle Network, with a specific target for 40 per cent of Londoners to live within 400 metres of the Strategic Cycle Network by 2030. Figure 13 shows the extent of London's Strategic Cycle Network as of October 2025.

Figure 13 London's Strategic Cycle Network, October 2025.



Source: TfL Strategic Analysis, Customer & Strategy.

With more Cycleways launched over the last year, the length of the Strategic Cycle Network reached 431 kilometres in October 2025, up by seven per cent from 403 kilometres in 2024 and almost five times the length of 90 kilometres in 2016. As of

October 2025, 29 per cent of Londoners lived within 400 metres of the Strategic Cycle Network, an increase from 27 per cent in September 2024 and from an estimated five per cent in 2016, thus bringing us closer to the target. This is estimated from the proportion of each Output Area that falls within a 400-metre buffer (straight line distance) of the Strategic Cycle Network and applying that proportion to the population data available at Output Area level.

Estimates of relative cycling demand on TfL's Cycleways

With their continuous expansion over the last few years there has been an increased interest in understanding what impact Cycleways have on London's overall cycling.

One of the main aspects of interest is the extent to which these routes are used, or in other words how much of total cycling takes place on Cycleways. Answering this question is not straightforward, since there is no specific monitoring designed for it. Given the extent of London's cyclable network and the constant changes to the Cycleway network, it is also not feasible to design a bespoke monitoring strategy.

However, we have other data sources that can be used as a proxy to estimate an order of magnitude of the proportion of cycling in London that may take place on Cycleways:

- The first and most reliable one is the LTDS. When respondents record a cycling trip in their travel diary, they are asked whether they used a Cycleway for any part of it. Using this as a proxy, data from the 2022/23 to 2024/25 three-year period suggested that 34 per cent of cycling trips recorded had used a Cycleway, compared to 59 per cent where a Cycleway was not used and the rest marked as unknown. It is important to note that this method relies on respondents' recall, which is not always accurate, as well as on their own interpretation of what constitutes a Cycleway. Nonetheless, it provides a useful reference point for a first approximation.
- The other source is the strategic cycle counts programme that underpins the headline cycling demand estimates discussed above. While it is not possible to provide a weighted and expanded estimate (since Cycleway status is not a stratum in the sample of count locations), the Cycleway status is known for all the count locations on the panel and so it is possible to calculate the proportion of cycle flows on the Cycleway sites over the total. Although this approach is at risk of bias towards the strata in the sample (area of London and road type), to the extent that it was possible we conducted some sense checks that did not suggest any major biases that would invalidate this rough estimate. Therefore, based on 198 out of 1,451 count locations (14 per cent) which are on Cycleways, we estimated that between 2022 and 2025, approximately 33 to 34 per cent of the cycle flows took place on sites at Cycleways (as of 2025).

Although this is by no means a formal validation, the fact that both sources yield a very similar number (although representing different things – proportion of trips from LTDS and proportion of cycle flows from the counts) gives some reassurance that, probably, at least the order of magnitude is correct. Therefore, we can say that, indicatively, **about a third of cycling in London could take place on Cycleways**.

Given that Cycleways only make up about 2.5 per cent (401 kilometres) of the cyclable network of roads and paths in London (which totals just over 16,000 kilometres), it is clear that Cycleways carry a disproportionate amount of the cycling traffic in London. This goes to show how there are many cycle users who prefer to use these designated routes and seems to point to their potential to unlock further cycling growth.

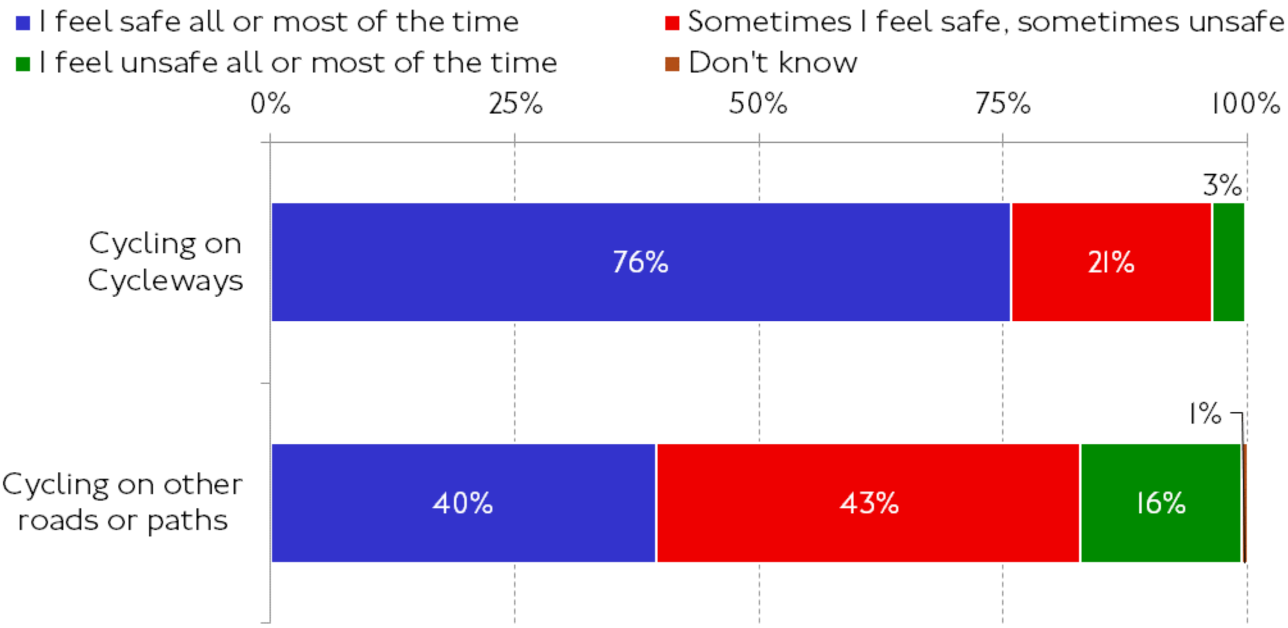
Perceptions of Cycleways by London residents who cycled at least once a month

According to the LTDS average between 2022/23 and 2024/25, 43 per cent of people who reported cycling at least once a month stated having cycled on any Cycleway in the previous year. This average proportion conceals important variability across different cycling frequency categories, with the proportion for people who cycled five or more days per week reaching up to 59 per cent while the proportion for those who cycled at least once a month but less frequently than fortnightly was 26 per cent.

It is worth noting that questions about Cycleways are only asked to relatively frequent cycle users (monthly or more) because it is considered that more infrequent users are less likely to be aware of the Cycleways programme, to identify them correctly on the network and to recall their experiences accurately.

Another aspect of interest about Cycleways is how safe people feel using them compared to their feelings of safety cycling elsewhere. As shown in figure 14, more than three quarters (76 per cent) of London residents who were asked this question stated that they felt safe all or most of the time on Cycleways, compared to only 40 per cent feeling safe all or most of the time on other roads or paths.

Figure 14 Feelings of safety of London residents who cycled at least once a month and used Cycleways in the previous year, by cycling environment, LTDS, three-year average between 2022/23 and 2024/25.



Source: TfL Strategic Analysis, Customer & Strategy.

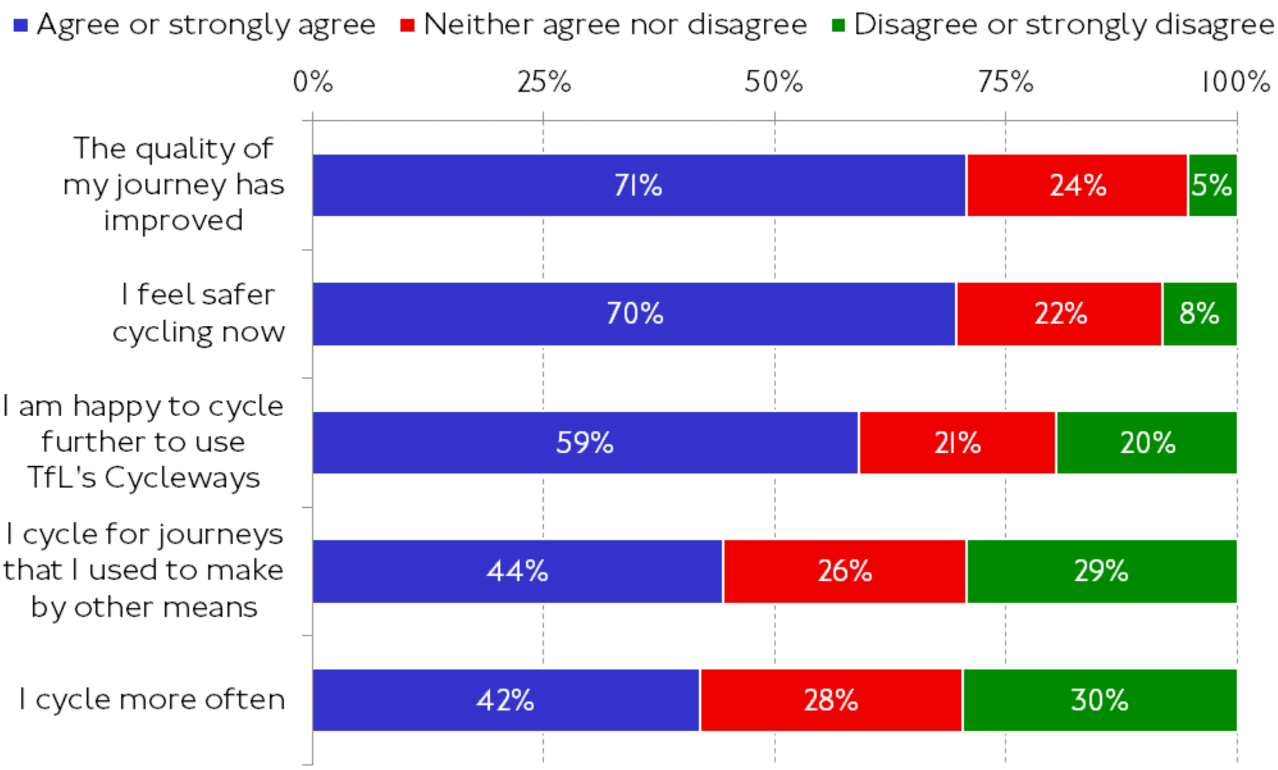
By contrast, only three per cent of respondents stated feeling unsafe all or most of the time on Cycleways, compared to 16 per cent on other roads or paths.

Interestingly, when describing feelings of safety while cycling outside the Cycleways network, the largest group of respondents (43 per cent) stated mixed views about sometimes feeling safe, others unsafe, perhaps suggesting a wider variability of cycling experiences when there is no Cycleways provision compared to a more consistent (and overwhelmingly positive) experience when cycling on Cycleways. This is not surprising given that, as described above, Cycleways are only designated as such if they meet our strict quality criteria.

Alongside feelings of safety, users' satisfaction with Cycleways is another important indicator of the success of the programme. Among the same cohort of respondents (London residents who reported cycling at least once a month and used a Cycleway in the previous year), 78 per cent stated that they were satisfied or very satisfied with Cycleways, compared to six per cent who said they were dissatisfied or very dissatisfied and 16 per cent who felt neither satisfied nor dissatisfied.

Finally, another key aspect of interest about the impact of Cycleways on cycle users' behaviour is the extent to which they feel that the introduction of Cycleways has improved the experience of their journey. Figure 15 summarises the responses to a set of questions in this regard.

Figure 15 Impacts of Cycleways on London residents who cycled at least once a month and used Cycleways in the previous year, LTDS, three-year average between 2022/23 and 2024/25.



Source: TfL Strategic Analysis, Customer & Strategy.

The main takeaways are:

- A majority of respondents (71 per cent) agreed that the **quality of their cycling journeys** improved since the introduction of Cycleways.
- About the same proportion (70 per cent) agreed that they **felt safer** cycling since the introduction of Cycleways.
- A smaller majority (59 per cent) agreed that they would **cycle further to use Cycleways**, which suggests a moderate attraction effect but also reflects the fact that many parts of London are not well served by Cycleways, so that a detour to use one of them may be unreasonable for the specific journey.
- Finally, 44 per cent of respondents agreed that since the introduction of Cycleways they now **cycled for journeys they previously made by other means of transport** (that is, who shifted their mode of travel to cycling); and 42 per cent that they **cycled**

more in general. Note that this does not necessarily reflect mode shift as it applies to travel in general rather than to specific journeys.

All in all, while the underlying reasons, motivations and behaviours behind these trends are likely the result of a complex interaction of many factors such as proximity to the Cycleway network, general travel behaviour, past cycling experience, etc., the results above suggest that Cycleways make an overall positive impact on London residents' travel behaviour.

The impact of cycling infrastructure on cycle flows

Since 2022 the strategic counts that underpin our cycling estimates include an additional classification of where on the street's layout cycles are observed (for example on the main carriageway, on any cycle or bus lanes or on the pavements). This allows us to test whether there is a correlation between observed cycle flows and the presence of those infrastructure elements.

For this analysis we used all cycle flows from the strategic counts in 2022, 2023 and 2024 combined. While it is acknowledged that there may have been changes to the layout of some count locations over time, these are very rare and would not affect the high-level results. Furthermore, combining three years of data allows for a more robust sample.

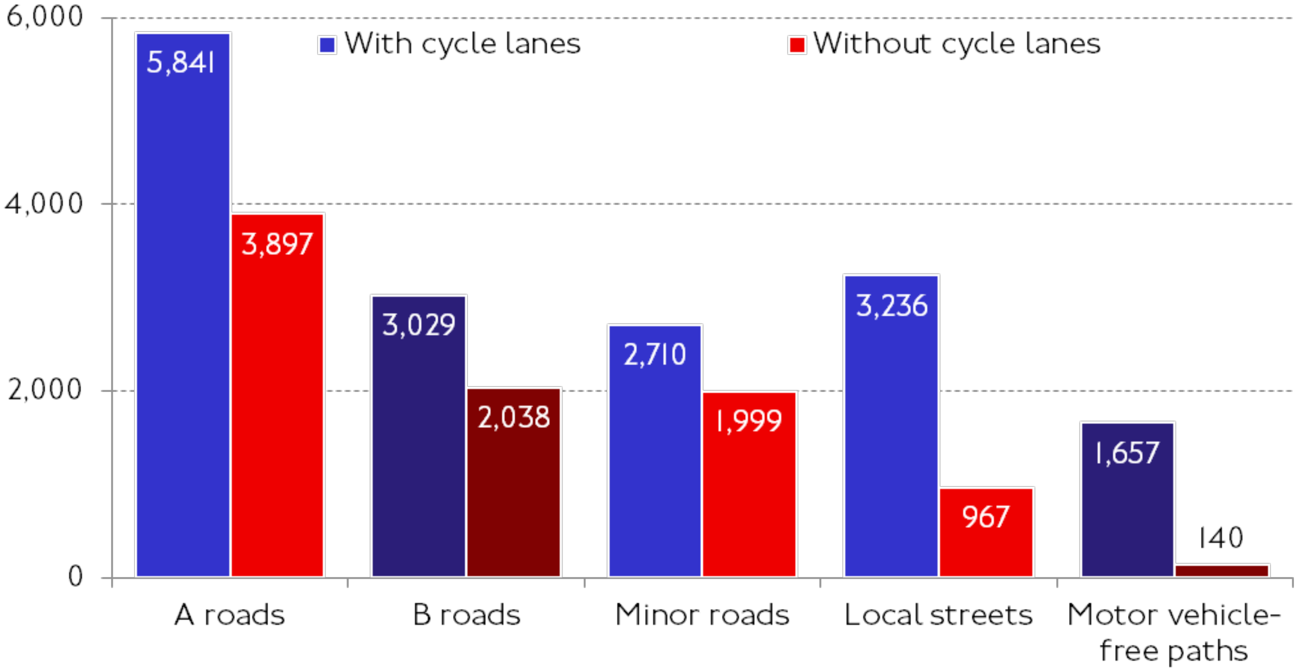
The **first part** of the analysis looked at differences in cycle flows among count locations on road layouts with the same characteristics (without bus or cycle lanes; with bus lanes only; with cycle lanes only; with both bus and cycle lanes and without any motorised traffic). Statistically significant differences (according to non-parametric testing of the median cycle flows, controlling for area of London and road type) were found between layouts with no bus or cycle lanes and any other layouts with a cycle lane (regardless of whether there were also bus lanes) in all but one of the area-road type combinations (where a significance different could not be detected likely due to insufficient statistical power from a small sample size). No significant differences in the median cycle flow were detected among the other layouts, suggesting that **the presence of cycle lanes was the only significant factor**, regardless of any other provision like bus lanes or motor vehicle-free paths.

This first conclusion that cycle lanes were the only relevant infrastructure element allowed the re-specification of the analysis to focus only on the presence of cycle lanes (while still controlling for London area and road type). This **second part** of the analysis found statistically significant differences (with the same testing parameters as above) for cycle flows at locations with and without cycle lanes on almost all the road type and area of London combinations. The only exceptions where a significant difference in median cycle flow could not be proven were B roads and motor vehicle-free paths in central London (likely due to low sample sizes and weak statistical power) and minor roads in outer London (which perhaps showed a genuinely small difference).

To illustrate these findings, figures 16, 17 and 18 below show the average (mean) cycle flow with and without cycle lanes for each of central, inner and outer London areas and all road types in our classification. The differences in magnitude are evident in most cases. Note however that while medians were used for the significance testing of the differences, averages (arithmetic means) which are more widely understood are plotted on the graphs for ease of reference. Where statistically significant differences in median cycle flow could not be proven the bars have been coloured with a darker shade.

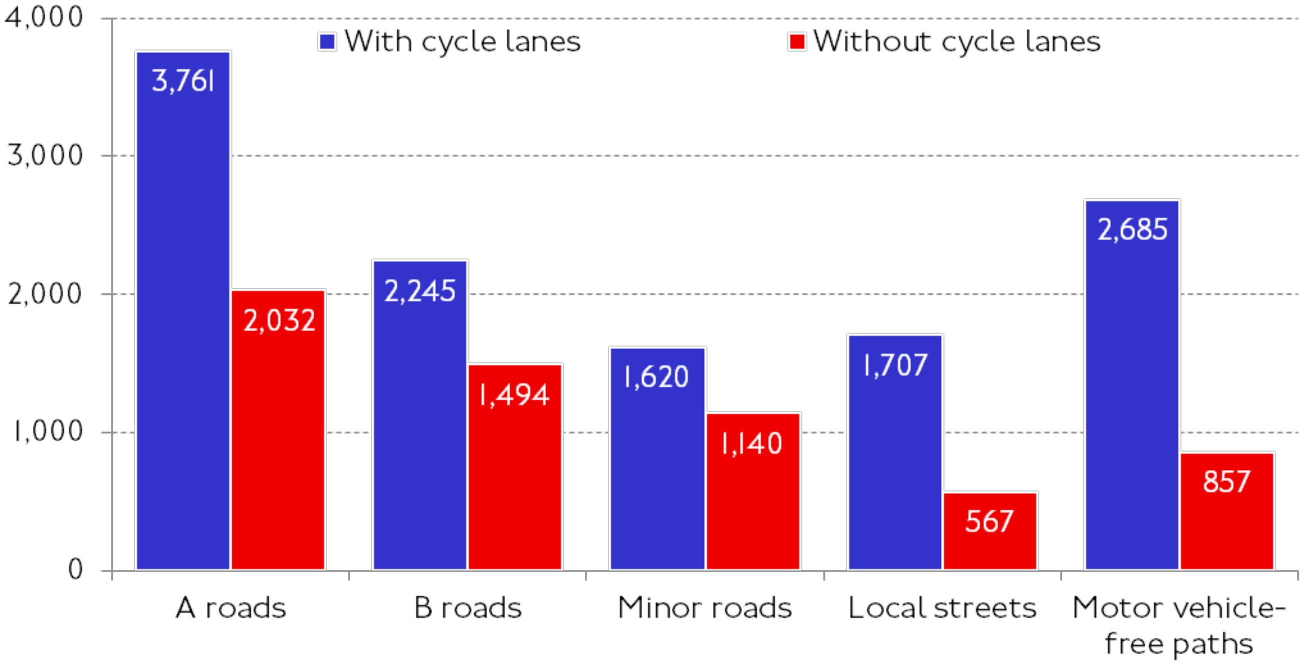
It is important to stress, however, that while these results indicate that **the presence of cycle lanes on a street is correlated with higher cycle flows at that location** (regardless of area of London and relative importance of that street on the road network as given by the road type), this does not in any case imply causality in any direction. In particular, this analysis cannot prove that the provision of cycle lanes leads to an increase in flows, although this may well be true.

Figure 16 Average (mean) cycle flow on central London count locations with and without cycle lanes, by road type, all years between 2022 and 2024.



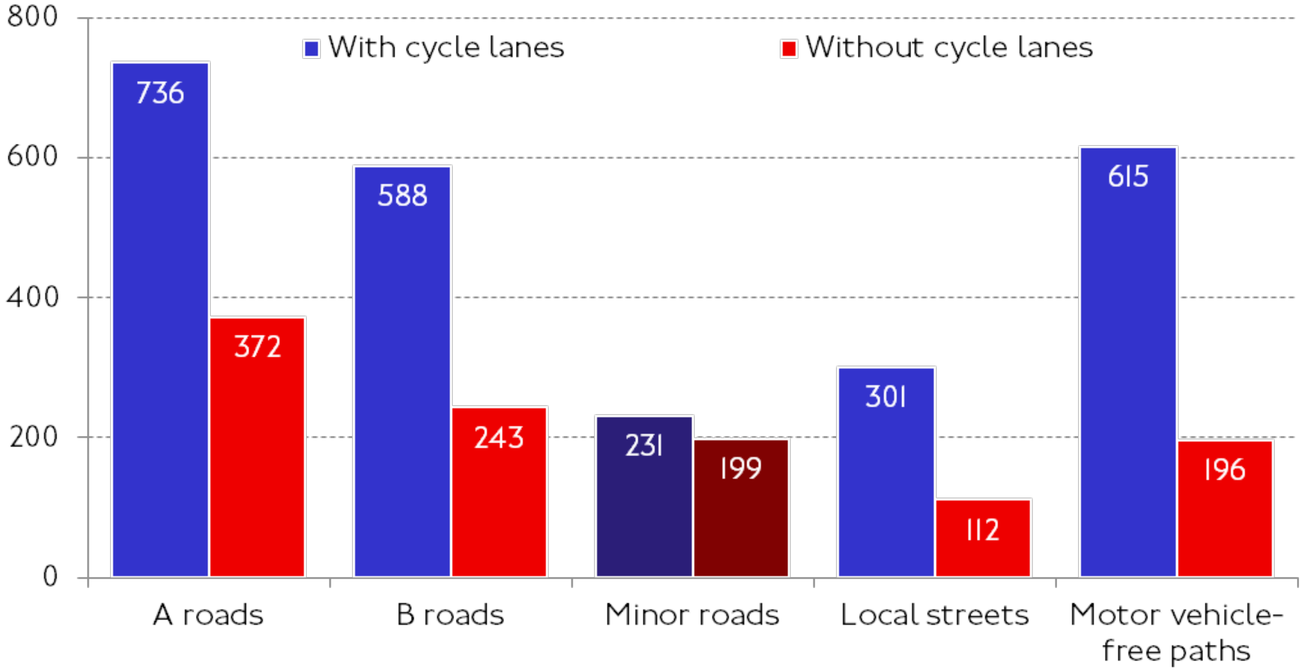
Source: TfL Strategic Analysis, Customer & Strategy.

Figure 17 Average (mean) cycle flow on inner London count locations with and without cycle lanes, by road type, all years between 2022 and 2024.



Source: TfL Strategic Analysis, Customer & Strategy.

Figure 18 Average (mean) cycle flow on outer London count locations with and without cycle lanes, by road type, all years between 2022 and 2024.



Source: TfL Strategic Analysis, Customer & Strategy.

Pavement riding

The classification of the strategic counts into where on the street's layout cycles are observed also allows us to explore the extent to which cycles travel on pavements, a practice that is usually illegal. And since the strategic counts also capture e-scooters since 2022, it is also possible to expand this analysis to this mode. Note however that the counts cannot differentiate whether the observed e-scooters are private (illegal) or hired through the ongoing trial of rental e-scooter schemes, although the fact that this trial is geographically restricted (and the participating e-scooters geo-fenced through GPS) allows us to infer that e-scooters observed outside of the trial area must be private.

The main conclusions from this analysis (table 4) suggest that pavement riding occurs more frequently among e-scooter users than among cycle users and, for both modes, more frequently away from the central areas where there is typically a higher provision of safe infrastructure for these modes.

The table shows that pavement riding increases for both cycles and e-scooters as one moves away from the centre. This likely reflects a combination of factors such as:

- The density of safe, dedicated provision for these modes: With fewer cycle lanes further away from central London the temptation to ride on the pavement increases.
- The availability of space on pavements: With lower density of people using the pavements away from the centre there are more opportunities for pavement riding without direct conflict with pedestrians.
- The general traffic conditions: With more vehicles and higher speeds as one moves away from the centre the road network becomes more hostile for e-scooters and cycles, thus making them more likely to take refuge on pavements.
- The lack of formal and informal enforcement: With fewer people in the less dense areas away from the centre there is less pressure to comply with the law.

Table 4 Proportion of daily flow that takes place on the pavement, by area of London and vehicle type, all years from 2022 to 2024.

Area	Cycles (percentage)	E-scooters (percentage)
Central London	2	9
Inner London	5	22
Outer London	14	41
Trial area	[Not applicable]	17
Non-trial area	[Not applicable]	31

Source: TfL Strategic Analysis, Customer & Strategy.

Pavement riding is higher among e-scooter users than among cycle users. This probably reflects the different perceptions of each mode and the general understanding about the law. It is known that many people still believe that e-scooters are allowed on pavements and may therefore be naturally inclined to use them in that way.

This idea is perhaps supported by the relative difference in pavement riding between areas within and outside the trial area. Before hiring an e-scooter from the trial, users need to pass some basic training on the operator's app and agree to certain rules which often include acknowledging that pavement riding is unlawful. However, the lower incidence of pavement riding in trial areas may also be due to other confounding factors such as the location of those areas (mainly towards central and west London) and the fact that any e-scooter riding outside the trial area is, by definition, illegal. For context, the LTDS suggests that in the period from 2022/23 to 2024/25 on average only one per cent of households in London (two per cent of London residents) had an e-scooter available in their household.

Walking

Walking is the most common mode of transport in London, with 38 per cent of all trips by London residents in 2024/25 being walking (all the way) trips, which is around 6.2 million trips per day. Walking is also a vital way of accessing other modes, with most multi-modal trips requiring at least one walking stage to access the main mode used for the trip.

Because of the large size of the walking network in London and the relatively short distance of walking trips and stages, walking can be more difficult to measure than other modes. Note that in the data sources discussed in this section, 'wheeling' (travel akin to walking undertaken with a mobility aid such as a wheelchair or mobility scooter) is included in walking statistics, although it cannot be separately reported.

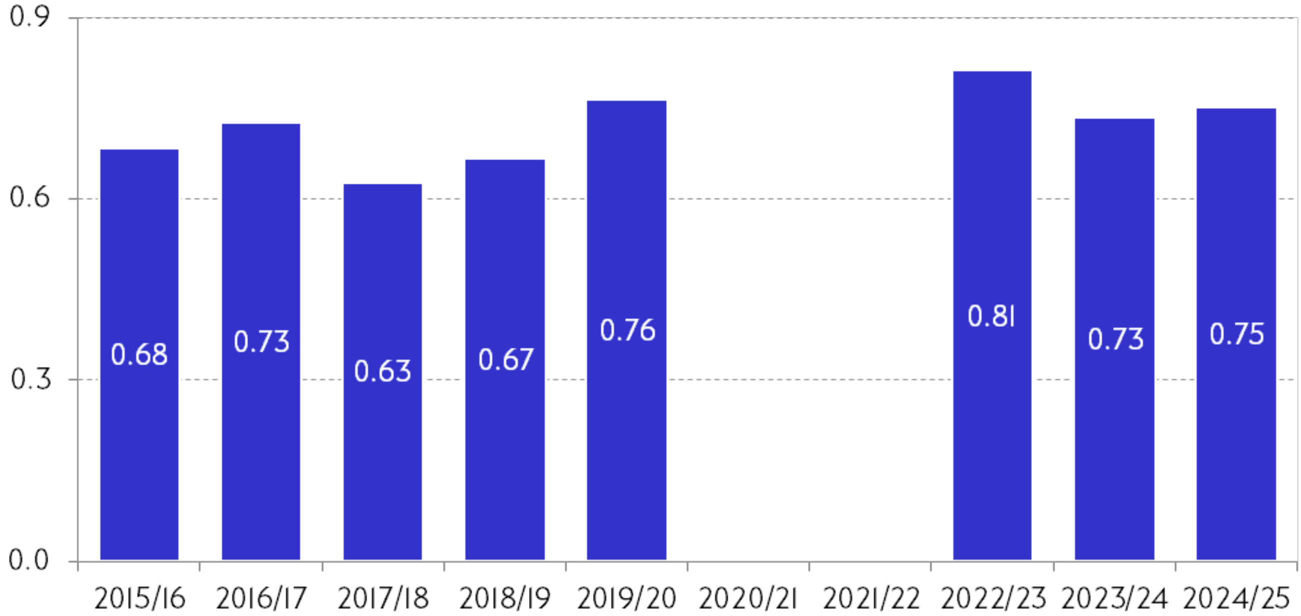
Walking by London residents

Data from our LTDS allows us to estimate how much walking the average London resident does, the reasons for making a walking trip and how that changes over time.

Overall walking (all the way) trip rates

Trip rates measure the average number of trips a person makes on an average day. Figure 19 shows the walking trip rate of London residents since 2015/16.

Figure 19 Walking (all the way) trips per person per day by London residents, LTDS, from 2015/16 to 2024/25.



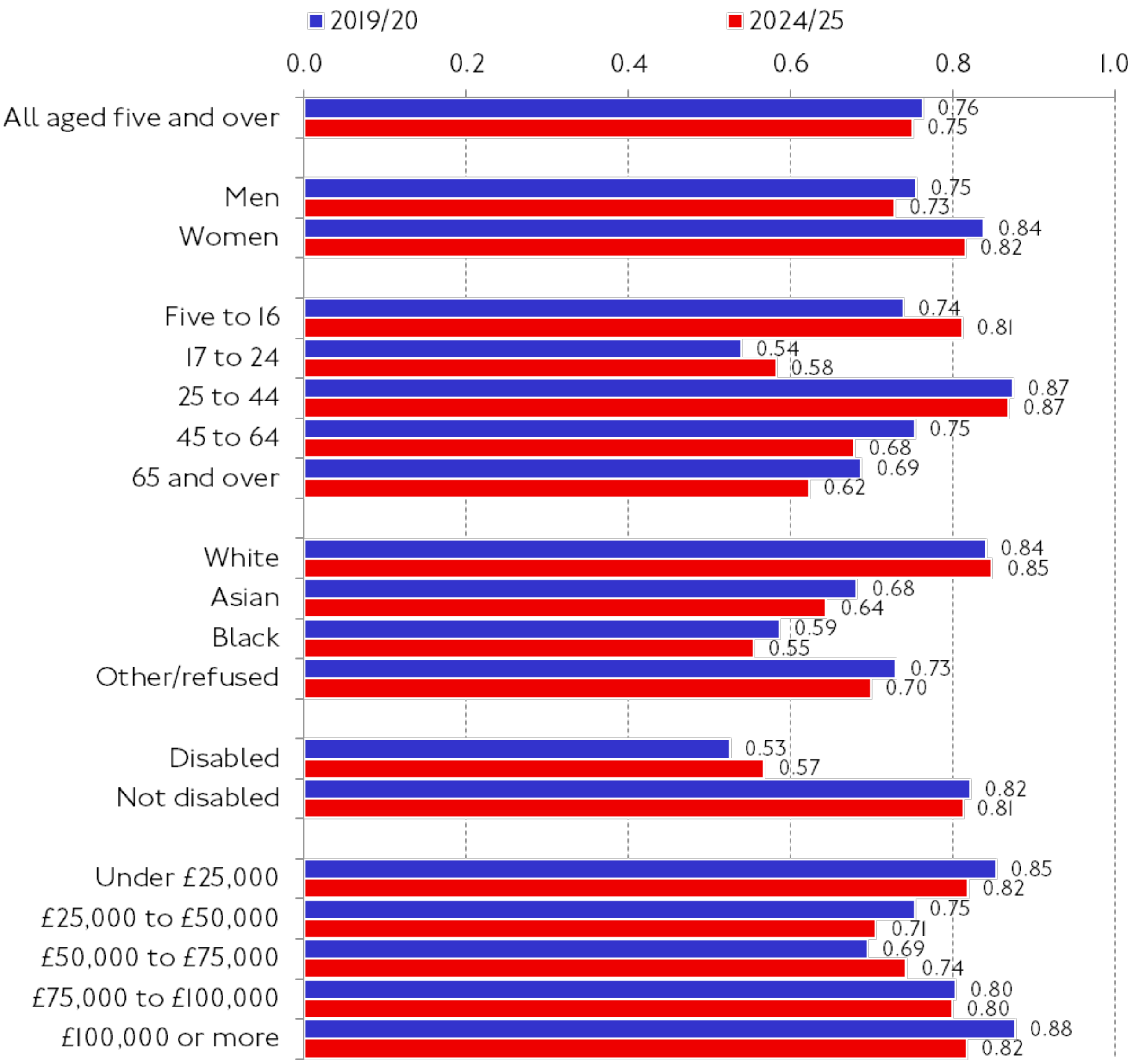
Source: TfL Strategic Analysis, Customer & Strategy.
Note: Comparable data is missing for 2020/21 and 2021/22 due to the impacts of the coronavirus pandemic.

Despite fluctuations between 2015/16 and 2017/18, the last few years before the coronavirus pandemic saw a steady increase in the walking (all the way) trip rate up to 0.76 trips per person per day in 2019/20. Immediately after the pandemic (2022/23) the walking trip rate was 0.81 trips per person per day, higher than in 2019/20 and perhaps reflecting the increases in active travel overall that occurred during the pandemic, when travel by other modes was more restricted and London residents made shorter, more local journeys. In 2023/24 the walking trip rate fell slightly to 0.73 trips per person per day but in 2024/25 it increased again to 0.75 trips per person per day, which is higher than all pre-pandemic years other than 2019/20.

Walking (all the way) trip rates by sociodemographic characteristics

Figure 20 shows how walking varies by sociodemographic characteristics, comparing the walking trip rate in 2019/20 and 2024/25 for each group.

Figure 20 Walking (all the way) trips per person per day by London residents, by selected sociodemographic groups, LTDS, 2019/20 and 2024/25.



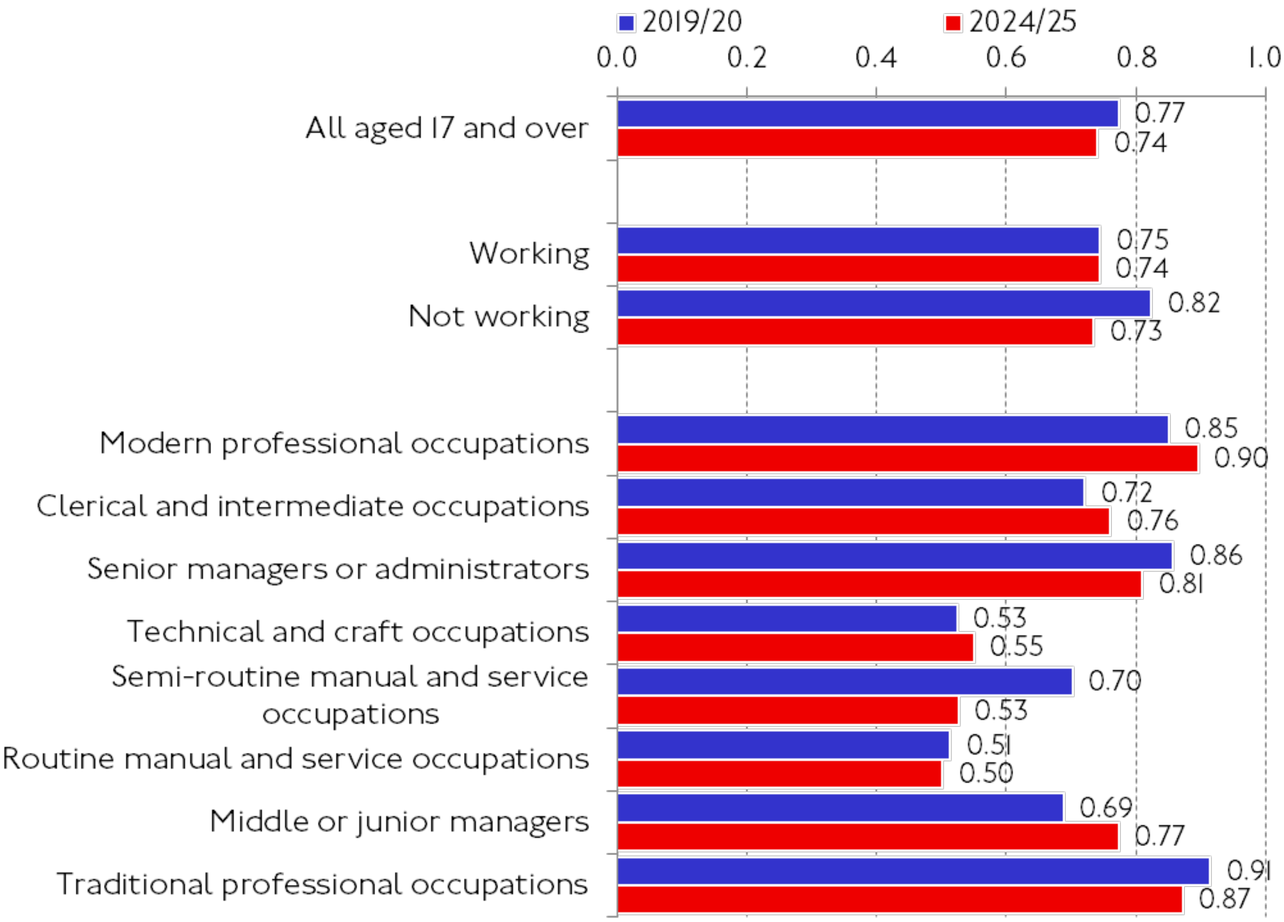
Source: TfL Strategic Analysis, Customer & Strategy.
Note: Due to various issues with the ethnicity data, it is not possible to separately report each component of the 'other/refused' category. These issues also affected the number of people who 'refused' to respond to this question. Although not ideal, presenting these categories combined provides the best like-for-like comparison between the two assessed time periods.

The main conclusions are:

- Overall, there were not large changes in walking trip rates between the two years.
- In general, **women** had higher walking trip rates than men.
- By **age**, children and those aged between 25 and 44 had the highest walking trip rates, while those aged 17 to 24 and people aged 60 and over had slightly lower walking trip rates.
- There were disparities in walking trip rates among different **ethnic groups**, with White London residents walking the most frequently.
- By **disability status**, London residents with a disability had lower walking trip rates overall. However, their walking trip rate increased between 2019/20 and 2024/25 while walking trip rates for London residents without a disability decreased slightly.
- London residents living in households with lower or higher **household incomes** tended to have higher walking trip rates compared to residents living in households with incomes in the middle brackets. While residents in lower-income households tend to have higher walking mode shares in general (for example due to cost, journey purpose or travel distances), residents in higher-income households travel more frequently overall, resulting in higher walking trip rates.

Figure 21 shows walking trip rates for London residents of working age (17 and over) by working status and type of work.

Figure 21 Walking (all the way) trips per person per day by London residents of working age (17 and over), by selected sociodemographic groups, LTDS, 2019/20 and 2024/25.



Source: TfL Strategic Analysis, Customer & Strategy.

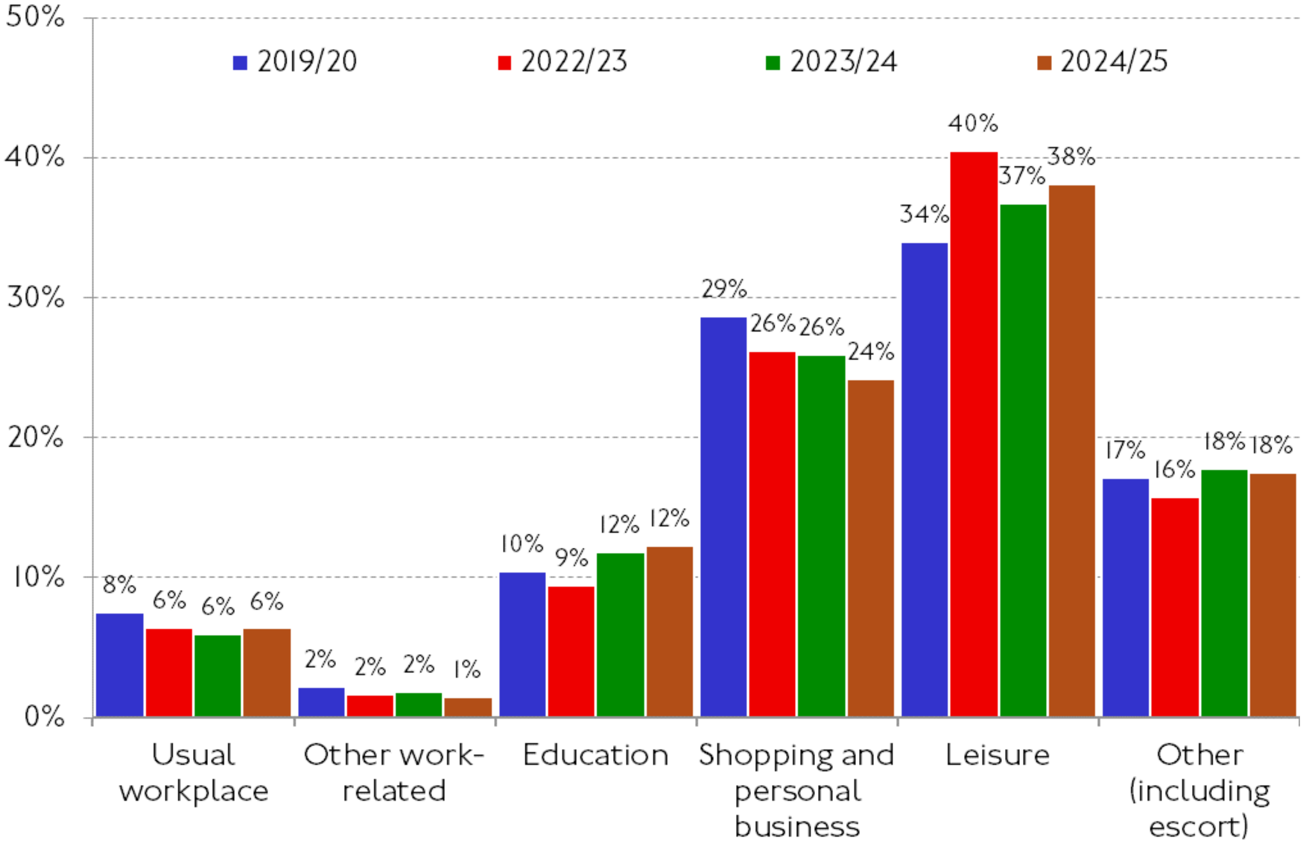
Although in 2019/20 London residents who were not working had higher walking trip rates compared to residents who were working, this was not the case in 2024/25 (when working residents had slightly higher walking trip rates than residents who were not working). This was driven by a larger-than-average decrease in the walking trip rate for those who were not working, possibly affected by ongoing cost-of-living pressures.

Walking trip rates vary according to the type of work London residents do. For example, modern or traditional professionals, managers or administrators tended to have higher walking trip rates than technical, craft or manual occupations.

Walking by journey purpose

Figure 22 shows the trend in walking journey purpose for London residents since 2019/20.

Figure 22 Proportion of London residents' walking (all the way) trips, by journey purpose, LTDS, 2019/20 and 2022/23 to 2024/25.



Source: TfL Strategic Analysis, Customer & Strategy.

In 2024/25, most walking (all the way) trips continued to be for leisure (38 per cent) or shopping and personal business purposes (24 per cent). However, the proportion of walking trips for shopping fell in recent years and was down by five percentage points compared with 2019/20. In contrast, the share of leisure walking trips increased by four percentage points over the same period.

Presumably due to the longer distances involved, most London residents did not walk for commuting or other work purposes, which combined amounted to a (rounded) eight per cent of all walking trips in 2024/25.

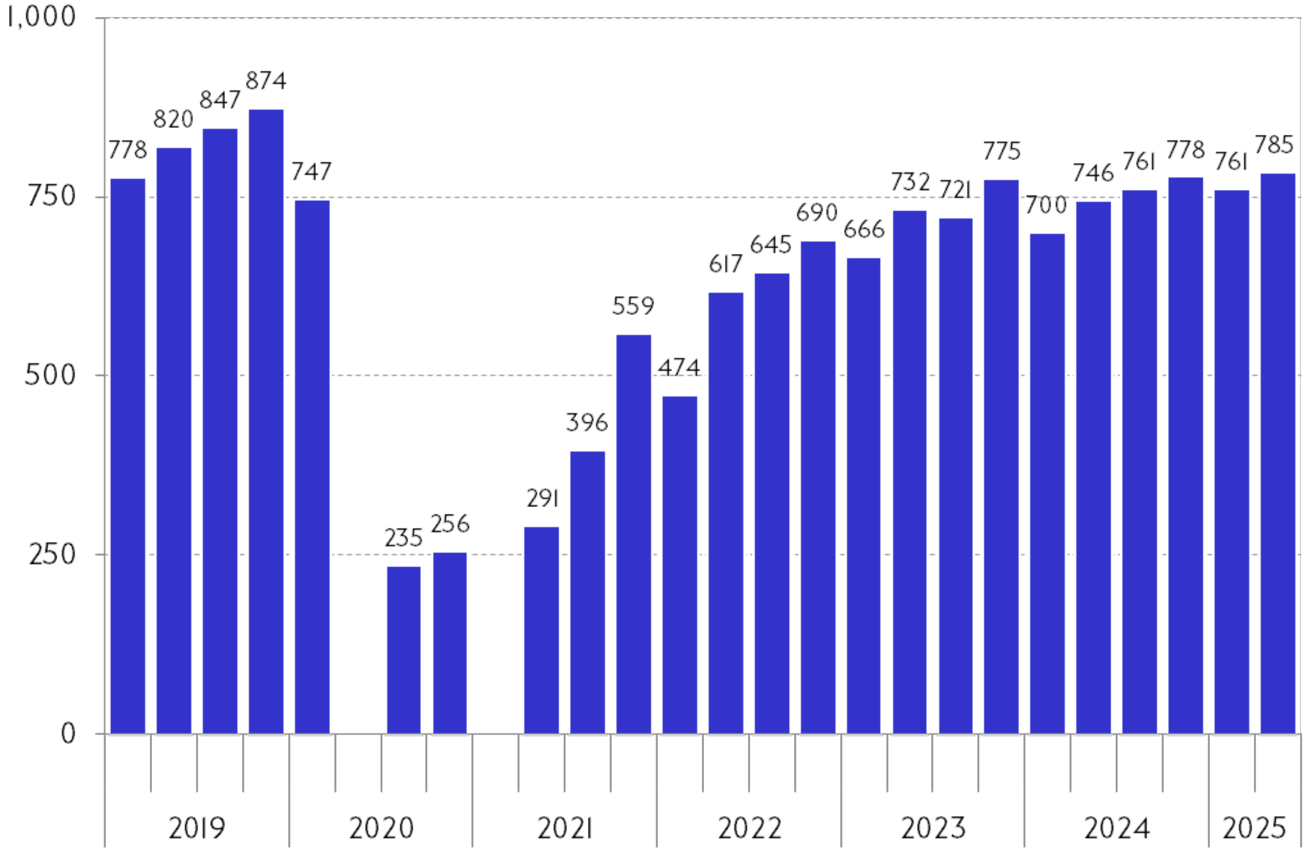
Pedestrian activity in central London

Since 2019 we have run a quarterly survey of pedestrian activity in central London. This survey uses 600 locations across central London that can be disaggregated across six different spatial areas.

Pedestrian activity over time

Figure 23 shows the trend in average hourly pedestrian flow across all sites by quarter since 2019.

Figure 23 Average hourly pedestrian flow (persons per hour per site) in central London, by quarter, from January to March 2019 until April to June 2025.



Source: TfL Strategic Analysis, Customer & Strategy.
Note: Data from some quarters is missing due to the impacts of the coronavirus pandemic.

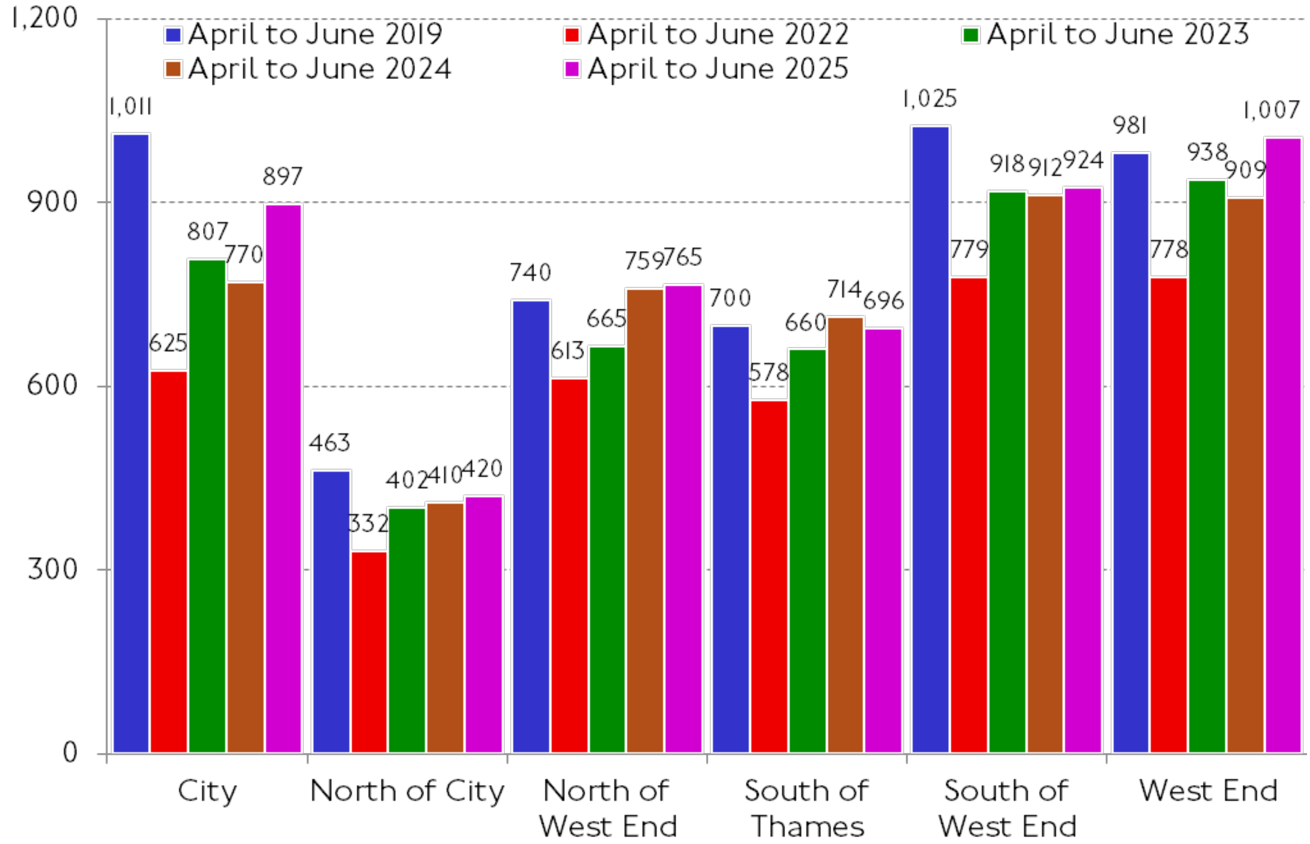
The graph shows that pedestrian activity in central London tends to be quite seasonal, with the highest flows in the last quarter of each year (October to December). It also clearly shows the impact of the coronavirus pandemic, with flows dropping in 2020 before recovering slowly in later years, albeit not yet to pre-pandemic levels.

Between 2023 and 2024, pedestrian activity in central London increased by three per cent. Looking at the first two quarters of 2025, pedestrian activity in central London continued to increase by an average of seven per cent compared to the same two quarters in 2024. However, in 2024 the absolute level of activity measured by this indicator still showed a shortfall of around 10 per cent compared to 2019 before the coronavirus pandemic.

Pedestrian activity by area

Figure 24 shows how pedestrian flows vary by area of central London, where areas can broadly be divided into those where people typically work, live, or visit for leisure or shopping.

Figure 24 Average hourly pedestrian flow (persons per hour per site) in central London, by area, April to June 2019 and 2022 to 2025.



Source: TfL Strategic Analysis, Customer & Strategy.

In 2019, before the pandemic, flows were typically higher in areas of central London where people mostly work (City and South of West End) or visit for leisure or shopping (West End).

By spring 2025 the highest pedestrian flows were observed in the West End, a typical leisure and shopping destination. The biggest drops in pedestrian flows were in areas that are typically work destinations like the City and the South of the West End, where pedestrian activity in 2025 was around ten per cent lower than in 2019. This would suggest that the main reason for the decrease in pedestrian activity across central London could be the slow return to regular in-person attendance at workplaces, perhaps reflecting continued high levels of hybrid and home working. Note however that the City of London in particular saw an increase in pedestrian activity over the post-pandemic period from 2022 until 2025, although it has not yet reached the pre-pandemic level. The same is true for most other areas to different degrees.

Indicative pedestrian activity change across London

Since 2022 the strategic counts discussed extensively above for cycling also include counts for pedestrians, although these are not representative of the walkable network in London because the panel of count locations was originally designed with cycling (only) in mind. However, they allow the production of an indicator of change in walking flows at the aggregate level on the basis of this particular sample of sites, as reported in previous Travel in London reports.

Table 5 shows the latest year-on-year changes in pedestrian flow by area of London stemming from these counts and alongside the equivalent results from the central London pedestrian activity survey discussed above.

Table 5 Year-on-year change in pedestrian flows by area, pedestrian activity survey compared to strategic active travel counts, from 2022 to 2025.

Period	Pedestrian survey - Central (percentage)	Strategic counts - Central (percentage)	Strategic counts - Inner (percentage)	Strategic counts - Outer (percentage)	Strategic counts - All London (percentage)
2022 to 2023	18.5	13.5	7.2	3.4	9.5
2023 to 2024	1.9	0.4	-3.0	0.1	-1.0
2024 to 2025	5.3	-2.2	3.8	2.1	0.8

Source: TfL Strategic Analysis, Customer & Strategy.
Note: The data from the central London pedestrian activity survey is from April to June of each year, while the data from the strategic active travel counts is collected in a wider and more loosely defined spring window (April to July).

Looking at the changes from 2024 to 2025, there is some discrepancy about the direction and amount of the change between the strategic counts in central London and the more robust results from the central London pedestrian survey.

Across all of London, the strategic counts suggest that there was minimal change (of less than one per cent) in pedestrian flows between 2024 and 2025, with an observed decline in pedestrian flows in central London and small increases in inner and outer London.

Physical activity and travel

To promote building physical activity into Londoners' daily travel routines (as a way to increase overall everyday physical activity) the Mayor's Transport Strategy has a goal for all London residents to undertake at least 20 minutes of active travel per day by 2041.

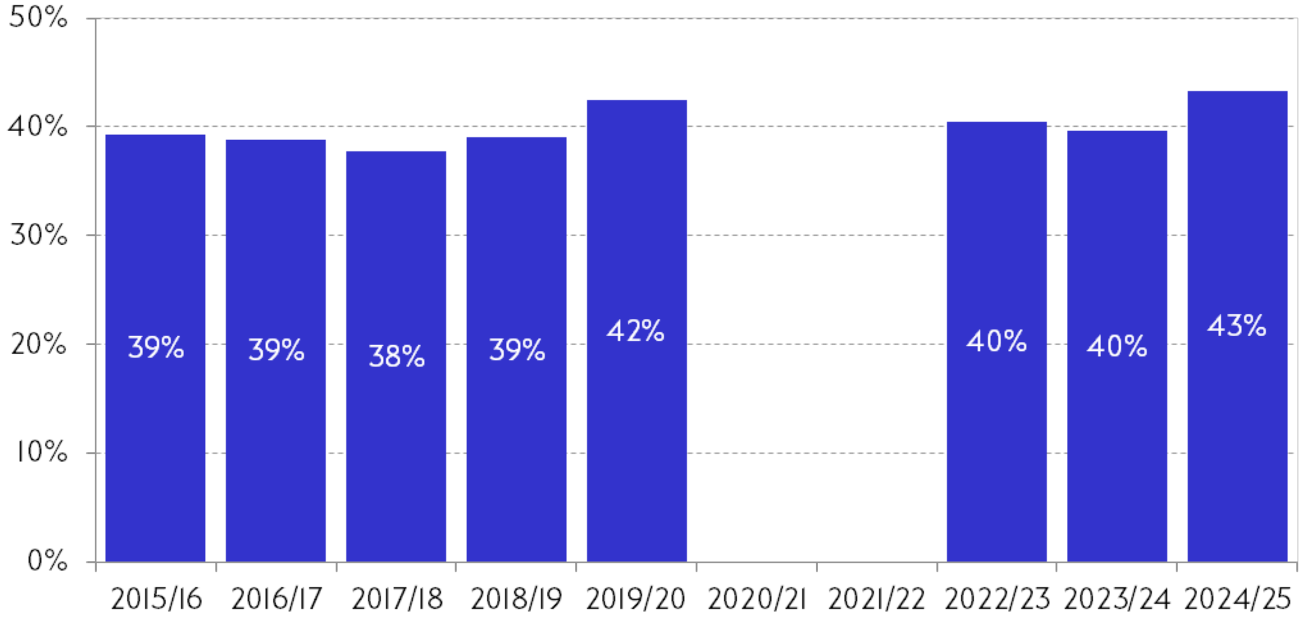
For the purposes of this measure, active travel is defined as either walking or cycling. By measuring the number of London residents who report doing at least 20 minutes of walking or cycling per day we can estimate how many are achieving minimum healthy levels of activity through active travel alone. But note that participation in other forms of physical activity, such as sport, is not monitored through this measure.

To monitor progress towards this goal, a representative source of data on the active travel of London residents is required. The LTDS, which includes a detailed one-day travel diary for each respondent (typically for the day before the survey interview) is currently the best source of data available for this purpose. However, the limitation of a single day travel diary is that some surveyed London residents who are routinely active may not have travelled (or may not have made their usual trips) on the day recorded. Therefore, to account for this, the aim for all London residents to achieve 20 minutes of active travel per day is translated into a target of 70 per cent of the LTDS sample of London residents (aged 20 and over) achieving 20 minutes of active travel on the day of the survey travel diary.

Overall trend in physical activity through travel

Figure 25 shows the proportion of London residents aged 20 and over who achieved the target of 20 minutes of active travel per day over the past decade.

Figure 25 Proportion of London residents aged 20 and over who undertook at least 20 minutes of active travel per day, LTDS, from 2015/16 to 2024/25.



Source: TfL Strategic Analysis, Customer & Strategy.
Note: Comparable data is missing for 2020/21 and 2021/22 due to the impacts of the coronavirus pandemic. | The historic series has been revised following the correction of small errors found in the source data.

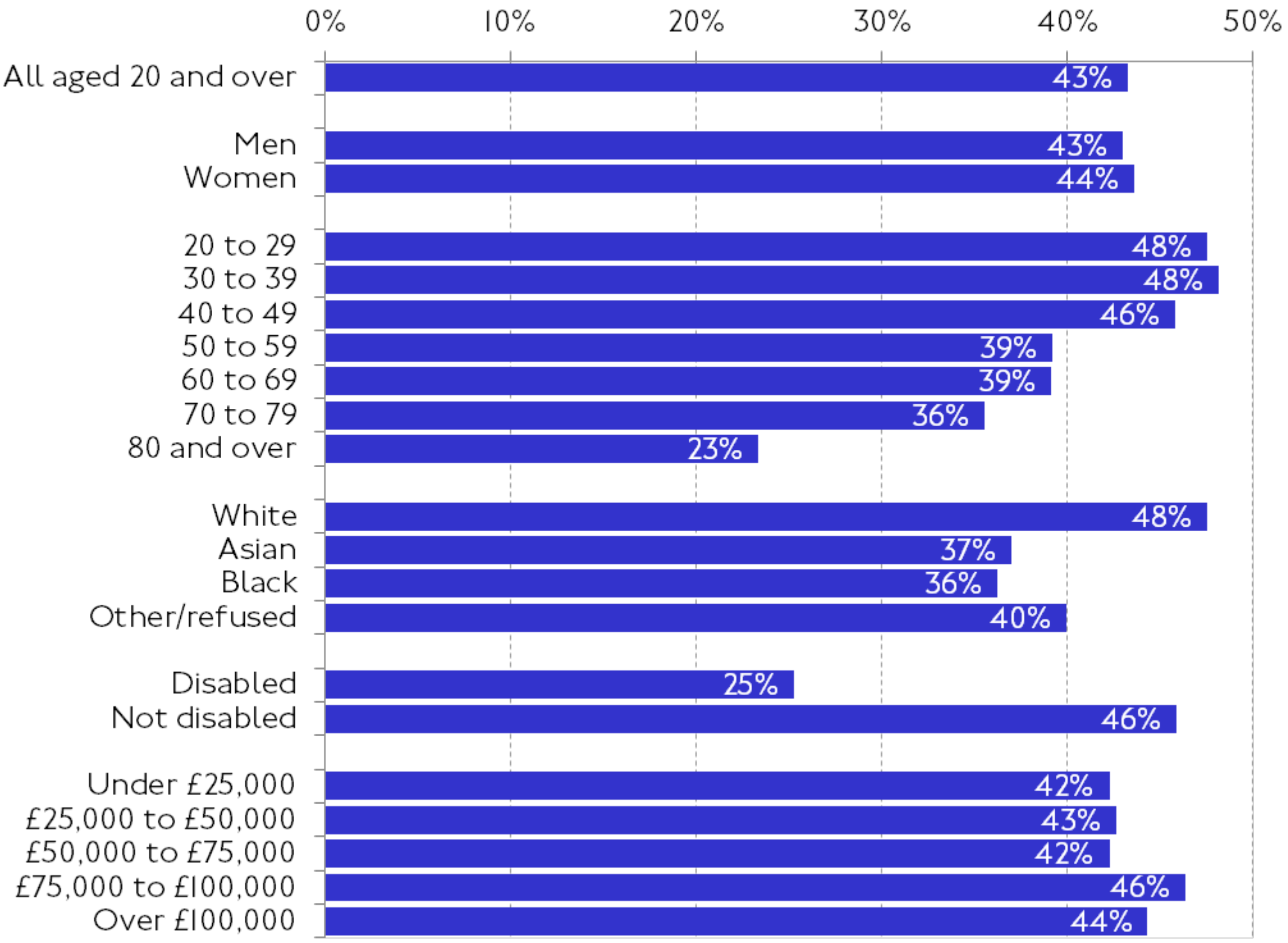
Historically, the proportion of London residents aged 20 and over who achieved 20 minutes of active travel per day remained around 39 per cent. Between 2015/16 and 2017/18, the proportion decreased slightly year on year before increasing in the two years before the coronavirus pandemic to 42 per cent in 2019/20. After the pandemic, this proportion decreased by two percentage points to around 40 per cent in 2022/23.

In 2024/25, this proportion (43 per cent) was similar and only slightly higher than in 2019/20 (42 per cent), following a three percentage points increase relative to 2023/24. This increase is linked to increases (relative to 2023/24) in the trip rates for walking (all the way) and rail trips, the latter leading to an increased number of walking stages for access to and egress from railway stations.

Physical activity by sociodemographic group

Performance against the target of 20 minutes of active travel per day for London residents aged 20 and over can also be examined by sociodemographic group (figure 26).

Figure 26 Proportion of London residents aged 20 and over who undertook at least 20 minutes of active travel per day, by sociodemographic group, LTDS, 2024/25.



Source: TfL Strategic Analysis, Customer & Strategy.
Note: Due to various issues with the ethnicity data, it is not possible to separately report each component of the 'other/refused' category. These issues also affected the number of people who 'refused' to respond to this question. Although not ideal, presenting these categories combined provides the best like-for-like comparison between the two assessed time periods.

The main features are as follows:

- There was little difference by **gender**, with the proportion of women achieving 20 minutes of physical activity only one percentage point higher than for men. This could be explained by the slightly higher trip rate for women than men.
- There is a clear relationship between **age** and participation in active travel. While approximately 48 per cent of London residents in their twenties and thirties achieved 20 minutes of active travel per day, only 23 per cent of those aged 80 and over did so.
- The proportion of London residents achieving the target of 20 minutes of active travel per day also varied by **ethnicity**, with 48 per cent of White residents achieving it compared to 37 per cent of Asian residents and 36 per cent of Black residents.
- By **disability status**, 46 per cent of those who are not disabled achieved the target of 20 minutes of active travel per day, compared to only 25 per cent of disabled residents.
- Finally, **household income** was seen to have a small impact, with residents living in households with incomes of £75,000 and over slightly more likely to meet the target than those living in households with lower incomes.

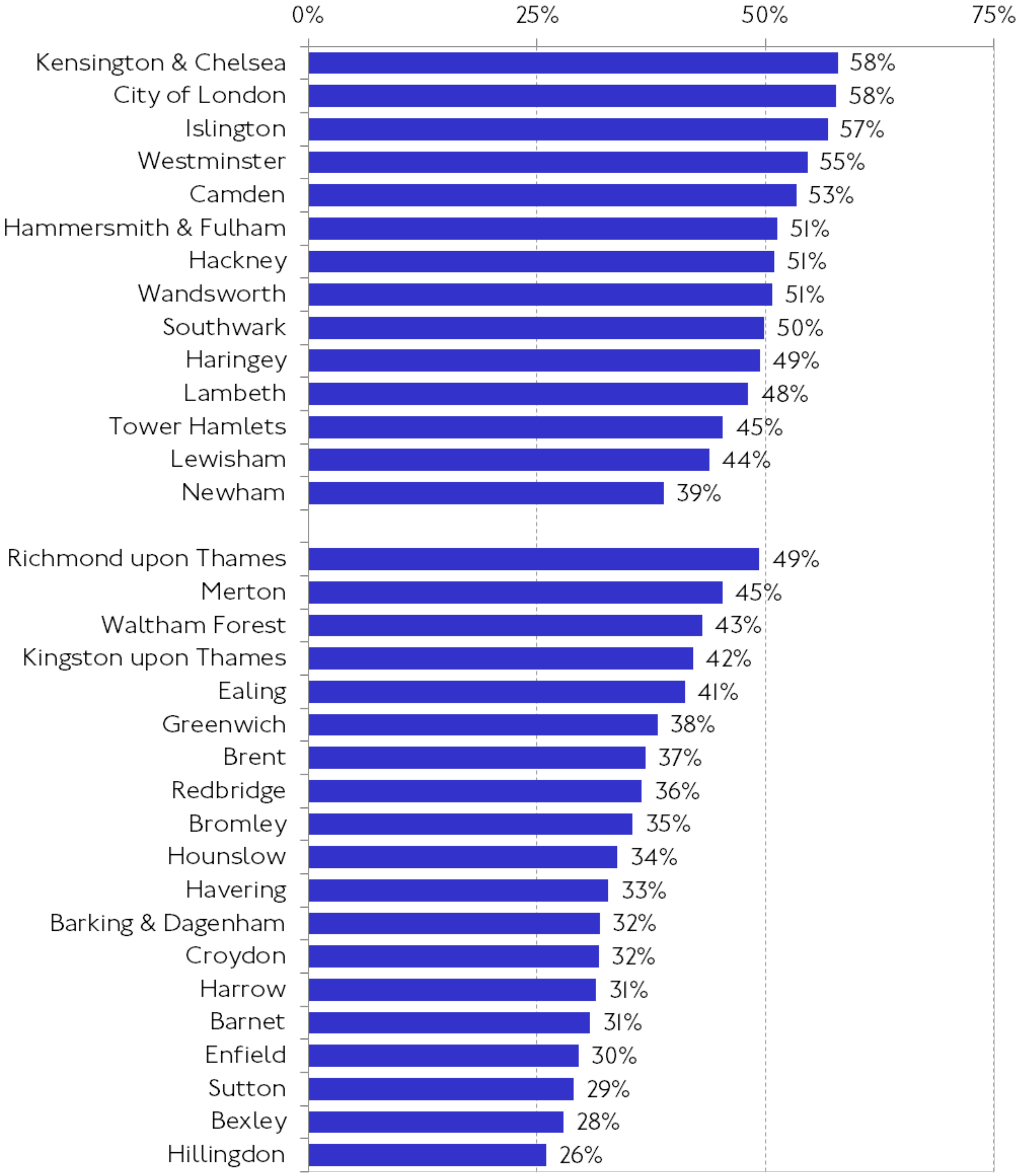
Physical activity by borough of residence

It is also useful to assess the proportion of London residents achieving the active travel target by household location. Figure 27 shows the proportion of London residents aged 20 and over who achieved 20 minutes of active travel per day between 2022/23 and 2024/25 by borough of residence. The results are three-year averages over this period.

Residents of inner London (top half of the graph) were generally more likely to achieve the target than residents of outer London (bottom half):

- For inner London boroughs, the proportion of residents achieving the target ranged from 39 per cent in Newham to 58 per cent in Kensington & Chelsea and the City of London (noting that very few people live in the City of London and therefore these results are less robust), with an average of 51 per cent across all inner London boroughs.
- For outer London boroughs, the range was from 26 per cent in Hillingdon to 49 per cent in Richmond upon Thames, with an average of 35 per cent across all outer London boroughs.

Figure 27 Proportion of London residents aged 20 and over who undertook at least 20 minutes of active travel per day, by borough of residence, LTDS, three-year average between 2022/23 and 2024/25.



Source: TfL Strategic Analysis, Customer & Strategy.